Moneris Vx810 Duet
OPERATING MANUAL

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1. Introduction

1.1. Getting Started

You must prepare your terminal before you process transactions:

1. Set up the hardware.
2. Configure the terminal.
3. Initialize the terminal.
4. Log on to the Moneris Host.

Once the terminal is ready to use, practice performing transactions in Demo Mode to ensure that any errors made while learning to perform transactions do not affect your business account.

1.2. Learning About the Terminal

The Moneris Vx810 Duet is an all-in-one POS solution consisting of the lightweight Vx810 terminal, incorporating a display screen and keypad, that connects to the Duet base containing the printer and communications hardware. The Duet can be operated with two optional devices: an external PINPad and a modular contactless reader.

The display screen displays prompts for you to respond to as well as other prompts for the customer. During transactions that require customer input, you will need to pass the PINPad back and forth so that you and the customer can view prompts and respond to them using the keypad.

The Vx810 Duet supports magnetic stripe and chip cards for debit and credit transactions, contactless cards for credit (and some debit) transactions, and magnetic stripe cards for purchasing card transactions.

To introduce yourself to the terminal, read these sections:

- Moneris Vx810 Duet Hardware
- Features and Procedures
- Demo Mode
- The Menu Feature

1.3. Caring for your Moneris Hardware

Proper care of your terminal and base will help ensure uninterrupted service. Here are some recommendations for maintaining the hardware in good working order:

IMPORTANT: Misuse of equipment can result in replacement liability.

- DO clean the hardware components with a dry or slightly damp cloth rinsed in a mild soap solution.
- Do NOT use solvents, detergents, cleaning fluids or abrasives on any of the hardware components.
- Avoid spilling liquids on components.
- Do NOT expose components to extreme temperatures.

1.3.1. Caring for the Terminal

- Clean the Magnetic Stripe Reader (MSR) periodically, using a Moneris POS cleaning card. These cards can be ordered online at shopmoneris.com or by phone at 1-866-421-1666.

  Note: Do NOT use the MSR cleaning card in the Chip Card Reader.

- It is recommended that merchants obtain their POS stationery and paper rolls from Moneris to ensure that these supplies comply with the applicable specifications. Contact the Moneris Merchant Service Centre to obtain additional supplies for your terminal or order online at shopmoneris.com.
- Load the paper into the printer correctly.

1.3.2. Caring for the Base

Avoid unnecessary movement of the base to prevent accidental disconnection of the power cables.

IMPORTANT: You must use the exact power adaptor provided with the terminal by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal. Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.

2. Features and Procedures

The Vx810 Duet terminal can be set up to access and process a variety of transactions for a variety of card types. The terminal supports magnetic stripe and chip cards for debit and credit transactions, contactless cards for credit (and some debit) transactions, and magnetic stripe cards for purchasing card transactions.

2.1. Standard Features

These features are available and enabled on all Moneris Vx810 Duet terminals.

- Language selection
- Card information security
- Communications status
- Menu-driven interface
- Demo Mode

2.1.1. Language Selection for Display, Receipts and Reports

The Moneris Vx810 Duet 8300 supports two language selections: 1) Merchant Language and 2) Customer Language.

Merchant Language

Supported languages:

1. English
2. French

Used to:

1. display merchant prompts
2. print merchant copies of receipts
3. print reports

Initial setting:

Set on the Moneris Host.

Changing the language:

The Merchant Language can be changed at any time. For details, see Selecting the Terminal Language.

Customer Language

Supported languages:

1. English
2. French

Used to:

1. display customer prompts

2. print copies of customer receipts

Initial setting:

Default is set by the Merchant Language but is set for each individual transaction based on the Language Code on the customer's card.

Changing the language:

If the Language Code is not present on the customer's card or if the code is neither English nor French, the customer is prompted to select either English or French. For details, see Selecting the Terminal Language.

2.1.2. Card Information Security

To reduce the risk of fraudulent card use, masking and/or truncation are applied to card numbers and expiry dates printed on receipts and reports.

Masking replaces a card's numbers (except for the last 4) with *'s. For example, the card number 1234 5678 9012 3456 is printed as **********3456 .

If a card number is truncated, only the last 4 digits are printed. For example, the card number 1234 5678 9012 3456 appears as 3456.

Card Numbers on Receipts

Numbers of debit, credit and gift cards are always masked on both Merchant and Customer copies of transaction receipts.

Card Numbers on Reports

Card numbers are truncated on all reports containing transaction details.

Reports that require the manager password, e.g. Batch Review, display the entire card number but the resulting report prints the truncated card number.

Expiry Date on Receipts

The credit card expiry date is not printed on receipts for credit card transactions.

Expiry Date on Reports

The credit card expiry date is printed in full on all reports containing transaction details.

2.1.3. The Menu Feature

All transactions and functions can be accessed through menus and sub-menus starting at the applications menu.

Navigating through menus

To scroll down:

Select the ↓ icon (press the first **purple** key on the left) to move down to the next menu screen.

To scroll up:

1. Press the **CORR** key to change the direction of the arrow on the display screen.

2. Select the ↑ icon (press the first **purple** key on the left) to move up to the next menu screen.

To select an item:

Press the function key beside the menu item (e.g., on the transactions menu, press **F1** to select Purchase).

Navigating through parameters

To move to the next feature:

- Select **Next**.

To move back to the last feature displayed

- Select **Previous**.

Changing the value of a parameter

1. Select **Edit**.

2a. Select **Next** to scroll through the values and select **Slct** to select a displayed value.

OR

2b. Key in a new value and press **OK**.

3. Select **Next** to move to the next feature.

When you are finished making changes:

1. Select **Exit**. The "Save Changes?" prompt appears.

2. Select **OK**. The menu re-appears.

Icons displayed on the menus

Icon	Indicates:
	CommServer is being used for Ethernet communications

The Applications Menu

The applications menu gives you access to the applications available on the terminal. When the terminal is not performing any transactions or functions and has been idle for a pre-set period of time, it displays the applications menu.

The Applications Menu

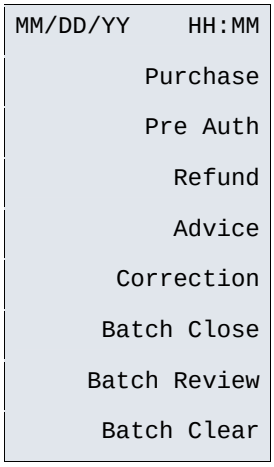
To access the applications menu from any screen:

- Press the *** (ASTERISK)** key.

Note: For instructions on navigation through the menus, see Navigating through menus.

The Transactions (DEBIT & CREDIT) Menu

This transactions menu allows you to select the type of transaction you want to process. The menu also provides access to the CONFIGURATION menu (press the **OK** key) and to the REPORTS menu (press the 1st **purple** key on the right). Some menu items may not appear on the terminal until a specific feature is enabled.



Select this menu item to:
process a Credit or Debit Purchase
open the Pre Auth menu
process a Credit or Debit Refund
process a Credit Advice
process a Credit or Debit Correction (void)
process a Batch Close
search for a transaction in the open batch
clear the batch on the terminal

The Transactions Menu

To access the transactions (DEBIT & CREDIT) menu:

1. On the applications menu, select **DEBIT & CREDIT**.

To return to the applications menu:

- Press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see Navigating through menus.

The Pre Auth Menu

This menu allows you to select the type of pre-authorization transaction you wish to process.

Select this menu item to:
process a Pre-Authorization
process a Pre-Authorization Completion
process a Pre-Authorization Deletion
print the Pre-Auth Transactions Report

The Pre Auth Menu

To access the Pre Auth menu:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Pre Auth**.

To return to the applications menu:

- Press **CANC ANNUL** then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see Navigating through menus.

The REPORTS Menu

This menu allows you to produce a variety of reports containing information about transactions stored in the terminal memory, transactions stored on the Moneris host and the configuration of the terminal.

The terminal must be initialized before this menu can be accessed. Some items may not appear on the terminal until a specific feature is enabled.

REPORTS	Select this report to obtain:
Stored Trans	a list of all transactions in the terminal memory
Deposit Totals	a list of deposit totals by card and transaction type
Clerk SubTotals	a list of totals for one or more clerks (only active if clerk IDs are configured)
Multi Terminal	a Deposit Totals report for one or more terminals
Merch SubTotals	a list of totals in the current batch by card and transaction type
Tip Report	a list of tip activity in the current batch by clerk and period (only active if Clerk IDs and Tip Processing are enabled)
Terminal Parms	a list of the current settings for each parameter
Terminal Stats	a list of the number of occurrences of error situations
EMV Param Rpt	a list of chip program parameters by card type
EMV Diagnostics	data on the last transaction if a chip card was used

The REPORTS Menu

To access the REPORTS menu:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).

To return to the applications menu:

Press **CANC ANNUL** then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see Navigating through menus.

The CONFIGURATION Menu

This menu allows you to configure a number of features and procedures and perform administrative functions.

CONFIGURATION	Select this menu item to:
Setup	configure parameters on the terminal
Servers	configure server/clerk IDs
Terminal Name	configure multi-terminal names
Menus/Keys	configure password level on menus
Set Language	set the display language
Initialize	initialize the terminal to the Moneris host
Host Logon	log the terminal on to the Moneris host
Host Logoff	log the terminal off of the Moneris host
About	display application version information (press **OK** to exit)
Contrast	increase or decrease the contrast of the display (The display changes immediately.)

The CONFIGURATION Menu

To access the CONFIGURATION menu:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK**.

To return to the applications menu:

- Press **CANC ANNUL** then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see Navigating through menus.

The Setup Menu

This menu allows you to set values for a number of parameters on your terminal. Some menu items may not appear on the terminal until a specific feature is enabled.

SETUP	Select this menu item to:
Demo	enter and exit Demo Mode
Printer	configure the receipt format
Terminal	configure features on the terminal
Merchant	configure merchant-related parameters
Comm	configure communications-related parameters
Host	configure communications type parameters
Merchant IDs	configure additional receipt parameters
IP Hosts	Do Not Use
Lock Kbd	Do Not Use
Date/Time	Do Not Use
Cashback	configure Cashback parameters
Edit Cards	Do Not Use

The Setup Menu

To access the Setup menu:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Setup**.

4. At the "Password:" prompt, key in the manager password and press **OK**.

To return to the applications menu:

- Press **CANC ANNUL** then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see Navigating through menus.

Terminal Parameters (Edit Terminal Menu)

The Edit Terminal menu allows you to edit Terminal parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (pres OK) > Setup menu > Terminal > Edit Terminal menu

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Pin Baud

Configures the terminal baud for use in standalone mode or with the external PINPad.

Key in **2** for standalone (default).

Key in **5** for PINPad.

Pin Format

Configures the terminal format for use in standalone mode or with the external PINPad.

Key in **0** for standalone (default).

Key in **4** for PINPad.

Tip% nn.nn

Sets a predetermined percentage of tip automatically added to Purchase transaction amounts (0-9999). If set to **0** (default) no tip is added.

Key in a percentage and press **OK**.

Tip Processing

Enables/disables tip prompting on Purchase, Pre-Authorization Completion and Advice transactions.

Enables/disables printing of the tip line on Pre-Authorization transaction receipts.

None (default)

On - Prompt

Sug Tip% 1 nn

default = 15

Sug Tip% 2 nn

default = 20

Sug Tip% 3 nn

default = 25

Determine suggested tip amounts for gratuity guidelines printed on Pre-Authorization receipts.

Note: The Tip Processing and Gratuity Guide? parameters must be enabled.

Determine the suggested tip amounts displayed when Enhanced Tip Processing is enabled (EnhancedTipProc parameter is set to **On**).

Note: If all 3 parameters are set to **0**, selecting **%** on Enhanced Tip Processing prompts the customer to key in a % amount. The **Gratuity Guide?** parameter does not need to be enabled for Enhanced Tip Processing use.

Key in a percentage and press **OK.**

Manager Pwd

Changes the manager password.

Key in a password and press **OK.**

Clrk/Srvr Mode

Enables/disables the Clerk Id: prompt.

0 - None (default)

2 - Prompt

Note: If the Use Def. Clrk? parameter is enabled, the prompt is disabled.

Idle Timeout

Sets the number of seconds of error message display before the terminal returns the card entry prompt.

Key in number of seconds and press **OK.**

PINPad Type

Configures the PINPad type, if one is connected to the terminal.

Select **None** for standalone mode (default)

Select **SC5000EMV** if a PINPad is connected

PABX Code

Sets the value of the PABX prefix that must be dialled to access an outside line.

Key in the prefix (min. 1, max. 4 alphanumeric characters) and press **OK**.

Note: This value is listed as the "PABX Access Code" on the Terminal Parameters Report.

Histories Limit

Do Not change this parameter unless directed to do so by Moneris.

Show CB Choices

Enables/disables the display of debit transaction Cashback pre-set amounts on the terminal and, if applicable, the external PINPad. On the terminal, customers can also select **Other** to key in an amount of their choice.

On - pre-set amounts are displayed for selection by the customer (default)

Off - the customer must key in a Cashback amount

Note: The CashBack Option parameter must be enabled. The desired pre-set amounts are configured via the Amt 1, **Amt 2** and **Amt 3** parameters.

Enable CTLS

Enables/disables use of a modular contactless reader connected to the terminal.

On (default if your Moneris merchant account is configured for contactless reader use)

Off (default if your Moneris merchant account is NOT configured for contactless reader use)

Idle Time Fmt

Sets the time format of the clock displayed on the transactions menu.

24 Hr (e.g. 14:24)

12 Hr (e.g. 02:24pm)

Terminal Beep

Enables/disables key beeping.

On (default)

Off

Process Tax

Enables/disables tax amount prompting on Purchasing Card transactions (the "xST Amt: $" prompt).

On

Off (default)

Note: You must enable the Commercial on? parameter. The **Tax Type (xST)** parameter is configured on the Moneris host.

Trning Settle?

Enables/disables settlement during Demo Mode.

On

Off (default)

CashBack Option

Enables/disables the Cashback Option on Debit transactions.

On

Off (default)

Note: The Show CB Choices parameter must be enabled. You can configure the pre-set Cashback amounts (Amt 1, **Amt 2**, **Amt 3**) that are displayed for selection by the customer. You can also configure the maximum dollar amount the customer can request as Cashback (Amt Limit).

Commercial On?

Enables/disables processing of Purchasing Cards (a.k.a., Commercial Cards or Corporate Cards).

On

Off (default)

Gratuity Guide?

Enables/disables printing of three suggested tip amounts on Pre-Authorization receipts.

On

Off (default)

Note: The Tip Processing parameter must be enabled. You can configure the amounts via the three Sug Tip% parameters.

Receipt Parameters Menu (Edit PCT)

The Edit PCT menu allows you to edit Printer parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press OK) > Setup menu > Printer > Edit PCT menu

IMPORTANT: Only some of the menu's parameters are listed below. You can ignore all other parameters.

Header Line 2 to 5

The third through sixth lines of text that appear after your merchant name and address at the top of receipts. You may also edit the Header Line 1 and Header Line 6 parameters.

Key in alphanumeric text (max. 40 characters) and press **OK.**

Footer 1 to 3

The text that appears at the bottom of the receipt. You may also edit the Footer 4 parameter.

Key in alphanumeric text (max. 40 characters) and press **OK.**

Customer Copy

Determines whether to print a Customer copy of the receipt after the Merchant copy on credit non-EMV (non-chip) transactions.

None - no customer copy prints

Confirm – "Prt Cust Cpy?" prompts for confirmation to print copy (**YES**/**NO**)

Automatic - automatically prints the customer copy (default)

Note: The customer copy is always printed for Debit and EMV (chip) transactions and, when set to Confirm, the terminal does not prompt. On signatureless transactions, the customer copy may or may not be printed depending on the card being used and how your terminal is configured

Reprnt Cust Copy

Determines whether a Customer copy of the receipt is printed in addition to the Merchant copy when reprinting receipts.

None - only the Merchant copy prints (default)

Confirm - "Prnt Cust Copy?" prompts for confirmation to print the Customer copy (**YES**/**NO**)

Automatic (both the Merchant copy and the Customer copy will print)

Note: On signatureless transactions, the Customer copy is always printed instead of the Merchant copy.

Prompt Beep Delay

Number of seconds to wait after beeping and displaying the "Tear Receipt; Press OK key" message before printing the customer receipt.

Key in the number of seconds and press **OK.**

Default = **120** seconds.

Enable Printer

Enables/disables the printer.

On (default)

Off

Note: Selecting **Off** results in the "printer disabled" message any time a report should be printed or "Printer Error" any time a financial transaction is attempted.

Large Amt Print

Determines whether to print double-wide characters for amount lines, the Sequence number and the Original Auth #.

On (default)

Off

Merchant Parameters (Edit Format Menu)

Use the Edit Format menu to edit Merchant parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press OK) > Setup menu > Merchant > Edit Format menu

IMPORTANT: Only some of the menu's parameters are listed below. You can ignore all other parameters.

Term Id

The Moneris Terminal ID.

Key in the Terminal ID and press **OK.**

Merch Num.

Your Moneris Merchant ID.

Key in the Merchant ID and press **OK.**

Default Clerk

The Clerk ID that will be used for all transactions when the Use Def. Clrk? parameter is enabled.

Key in the alphanumeric Clerk ID and press **OK**.

GST Tax Reg

QST Tax Reg

PST Tax Reg

HST Tax Reg

Your tax registration number for the tax type.

Key in your alphanumeric tax registration number and press **OK**.

Tax Type

The type of tax you are required to apply to all purchases.

0 - No Tax (default)

1 - HST

2 - GST Only

3 - PST/GST

4 - QST/GST

EnhancedTipProc

Enables/disables the Enhanced Tip Processing feature.

On

Off (default)

TipNone

Enables/disables the display of the **No Tip** option on Enhanced Tip Processing.

On

Off (default)

Note: The EnhancedTipProc parameter must be enabled.

Ask Inv Num?

Enables/disables the Invoice #: prompt.

On

Off (default)

Chip on PreAuth

Enables/disables the use of chip cards for Pre-Authorization transactions. This parameter does not affect the use of magnetic stripe cards for Pre-Authorization transactions.

On

Off (default)

Note: Many chip cards require a PIN instead of a signature from the cardholder. If a chip and PIN card is used during a Pre-Authorization, the cardholder MUST be present to enter their PIN during the transaction. For this reason, some businesses may wish to disable the use of chip cards for Pre-Authorization transactions. If the Chip on PreAuth parameter is set to **Off**, the "Swipe Card" prompt appears instead of the "Swipe or Insert Card" prompt during a Pre-Authorization, and you can swipe the card even if it is a chip card.

DispEMVPreAuth

Do Not change this parameter unless directed to do so by Moneris.

Use Def. Clrk?

Enables/disables the automatic use of the Default Clerk ID.

On

Off (default)

Note: The Default Clerk parameter must be configured.

Dial Communications Parameters (Edit CPT Menu)

Use the Edit CPT menu to edit dial communications parameters.

Transactions menu > CONFIGURATION menu (press OK) > Setup menu > Comm > Edit CPT menu

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a Batch Close then try editing the parameter again.

Pri Auth Phone

The Moneris phone number is automatically loaded into this parameter during initialization.

If blank, key in the Moneris authorization phone number and press **OK.**

Sec Auth Phone

The Moneris phone number is automatically loaded into this parameter during initialization.

Pri Sett Phone

The Moneris phone number is automatically loaded into this parameter during initialization.

Sec Sett Phone

The Moneris phone number is automatically loaded into this parameter during initialization.

Pri Init Phone

The Moneris initialization phone number.

If blank, key in the Moneris initialization phone number and press **OK**.

Sec Init Phone

This is the same value as **Pri Init Phone**.

Baud Rate

Sets the data transmission rate of the dial modem.

300 BAUD

1200 BAUD (default)

2400 BAUD

4800 BAUD

9600 BAUD

14400 BAUD

Mdm FastConnect

Do Not change this parameter unless directed by Moneris.

Blind Dial

Allows the terminal to dial without checking for a dial tone.

On

Off (default)

Dial Type

Sets the dial type.

Tone (default)

Pulse

Moneris Host Parameters (Edit Hosts Menu)

Use the Edit Hosts menu to edit Moneris Host parameters.

Transactions menu > CONFIGURATION menu (press OK) > Setup menu > Host > Edit Hosts menu

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a Batch Close then try editing the parameter again.

Comm Link Type

Sets the primary communications type.

Dial - sets dial as the primary communications type

CommServer - sets Ethernet as the primary communications type (default)

Alternate Dial - Do Not Use

ECRi - Do Not Use

Backup Support

If the terminal is configured for Ethernet communications, this parameter can be used to switch the terminal to dial communications if Ethernet communication is not available.

Note: The dial communications cable must be connected to the Duet base and a functioning telephone line before the terminal can successfully use dial communications as a backup.

None - If Ethernet communication is not available, the terminal cannot process transactions (default)

Auto Backup - If Ethernet communication is not available, the terminal displays "IP Connection Failed" then automatically attempts to use the dial line to communicate with the Moneris Host.

Prompt Backup - If Ethernet communication is not available, the terminal displays "Use Backup Com Confirm". Select **Yes** to have the terminal attempt to use the dial line to communicate with the Moneris Host OR select **NO** to cancel the transaction. The "IP Connection Failed" message appears then the terminal display the transactions menu.

Switch Backup - Moneris does NOT recommend using this setting. If Ethernet communication is not available, the terminal switches to dial communications and stays on dial communications until this parameter is changed to **None**, **Auto Backup** or **Prompt Backup**.

Use Backup - The terminal always uses dial communications.

Settle Comm Type

Sets the primary communications type for settlement. This must match the **Comm Link Type** parameter value.

Dial - sets dial as the primary communications type

CommServer - sets Ethernet as the primary communications type

Alternate Dial - Do Not Use

ECRi - Do Not Use

Card Imprt

Enables/disables the "Imprint Card Press OK Key" prompt. This prompt may appear during a Purchase or Refund transaction.

Key in **0** to turn the feature off

Key in **1** to turn the feature on

Additional Merchant Parameters (Edit MIT Menu)

Use the Edit MIT menu to edit additional merchant-related parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press OK) > Setup menu > Merchant IDs > Edit MIT menu

IMPORTANT: Only some of the menu's parameters are listed below. You can ignore all other parameters.

Merchant Number

Do Not Change .

Header Line 1

First line of text that appears after your merchant name and address at the top of receipts. You can also edit the Header Lines 2 through 5 parameters.

Key in alphanumeric text (max. 40 characters) and press **OK**.

Header Line 6

Second line of text that appears after your merchant name and address at the top of receipts. You can also edit the Header Lines 2 through 5 parameters.

Key in alphanumeric text (max. 40 characters) and press **OK**.

Footer 4

Last line of text that appears at the bottom of receipts. You can also edit the Footer Lines 1 through 3 parameters.

Key in alphanumeric text (max. 40 characters) and press **OK**.

Ethernet Communications Parameters (Edit ECT Menu)

Use the Edit ECT menu to display the Ethernet communications parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press OK) > Setup menu > IP Hosts > Edit ECT

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Pri Auth URL

The URL is automatically loaded into this parameter during initialization.

Pri Auth Port

The port number is automatically loaded into this parameter during initialization.

Sec Auth URL

The URL is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth URL**.

Sec Auth Port

The port number is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth Port**.

Pri Sett URL

The URL is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth URL**.

Pri Sett Port

The port number is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth Port**.

Sec Sett URL

The URL is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth URL**.

Sec Sett Port

The port number is automatically loaded into this parameter during initialization. This is the same value as **Pri Auth Port**.

Cashback Parameters (Cashback Menu)

Use the Cashback menu to configure parameters related to the Cashback feature.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press OK) > Setup menu > Cashback menu

Amt 1 ($10)

default = $10

Amt 2 ($20)

default = $20

Amt 3 ($30)

default = $30

Determine the dollar amounts displayed on the terminal when the customer selects the Cashback option on Debit transactions. The value displayed in brackets (e.g., ($10)) is the parameter's current value.

Select the parameter, key in the new dollar value (must be a multiple of 10) then press **OK**.

Note: The Cashback feature must be enabled (Cashback Option parameter set to **On**). Each **Amt** parameter has an allowable range, which is displayed when editing. The range is calculated based on the dollar amounts of the other **Amt** parameters.

Hint: If you are increasing the amounts, start at **Amt 3** then set **Amt 2** followed by **Amt 1** to avoid overlapping ranges.

Amt Limit ($40)

default = $40

The maximum dollar amount customers can request (key in) if they do not select a pre-set Cashback amount. The value displayed in brackets ($40) is the parameter's current value.

Select the parameter, key in the new dollar value (must be a multiple of 10) then press **OK**.

Note: The Cashback feature must be enabled (Cashback Option parameter set to **On**). The maximum value for this parameter is $990.

Menu and Editing Parameters (Menu Config Menu)

The Menu Config menu allows you to determine the menu items that are displayed and which of these require the manager password for access.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (pres OK) > Menus/Keys > Menu Config menu

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a Batch Close then try editing the parameter again.

Display on Menu options:

Yes

No

Password-Level options:

None

Manager

Main Menu/Keys

Select **Slct** to display and edit the following sub-items:

- REPRINT - Password Level
- REPORTS - Password Level
- Quick Setup - Password Level
- Cash Receipt - Password Level
- Purchase - Display on Menu; Password Level
- Pre Auth - Display on Menu; Password Level
- Refund - Display on Menu; Password Level
- Mail/Phone - Display on Menu; Password Level
- Advice - Display on Menu; Password Level
- Payment - Display on Menu; Password Level
- Correction - Display on Menu; Password Level
- Batch Close - Display on Menu; Password Level
- Batch Review - Display on Menu; Password Level
- Batch Clear - Display on Menu; Password Level

CONFIGURATION

Select **Slct** to display and edit the following sub-items:

- Setup - Display on Menu; Password Level
- Servers - Display on Menu; Password Level
- Terminal Name - Display on Menu; Password Level
- Menus/Keys - Display on Menu; Password Level
- Set Language - Display on Menu; Password Level
- Initialize - Display on Menu;Password Level
- Host Logon - Display on Menu; Password Level
- Host Logoff - Display on Menu; Password Level
- Contrast - Display on Menu; Password Level

SETUP

Select **Slct** to display and edit the following sub-items:

- Cashback - Display on Menu; Password Level
- Edit Tables - Display on Menu; Password Level

Pre Auth

Select **Slct** to display and edit the following sub-items:

- Pre-Auth Rpt - Display on Menu; Password Level

The following items are not editable:

- Quick Setup
- Phone
- Terminal
- Communications
- IP Hosts
- REPRINT
- REPORTS
- CONFIGURE SERVER
- DOWNLOAD
- TERM DOWNLOAD
- BATCH HIST RPTS

2.1.4. Demo Mode

Demo Mode allows you and your employees to practice operating the Moneris Vx810 Duet terminal WITHOUT affecting your terminal total amounts, your financial accounts or your customers' accounts.

Note: Demo Mode is available only if you close your terminal batches on the terminal (Merchant Close). If your terminal uses System Close, you cannot use Demo Mode. (See Processing a Batch Close.)

While the terminal is in Demo Mode:

- The DEMO icon ( ) is displayed on the left side of the screen on all menus (except the applications menu).
- All financial transaction types that are supported on your terminal can be performed in Demo Mode.
- All financial transactions will be approved.
- The message "APPROVED DEMO" will be displayed on the screen.
- All transactions will be stored in the terminal's memory while you remain in Demo Mode.
- All receipts for demo transactions and reports on demo totals will have a DEMO banner printed across the top.
- The initial transaction amount must be $1.00 or less.
- If you wish to add a tip to the Purchase amount, the tip amount must be $1.00 or less.

- If you select or key in a Cashback amount during a Debit Purchase, only $1.00 is added to the transaction amount regardless of which Cashback amount is selected or keyed in.
- If you change parameter values while the terminal is in Demo Mode, those changes will NOT be cleared when you exit Demo Mode. Parameter values affect the way the terminal works in both Live Mode and Demo Mode. Any changes you make in Demo Mode will also affect the way the terminal works when you perform live transactions.
- If you power off the terminal while it is in Demo Mode, it will still be in Demo Mode when you power it up.

For instructions on using Demo Mode, see:

- Transactions Available in Demo Mode
- Entering Demo Mode
- Exiting Demo Mode

2.2. Optional Features

These features may be available on your terminal depending on the configuration of your Merchant ID on the Moneris Host. If a feature is available on your terminal and you want to use it, you must enable and configure it. If you do not want to use a feature, you can disable it.

Contact the Moneris Merchant Service Centre to discuss these options and determine whether changes to your Merchant ID configuration are required in order to enable them.

IMPORTANT: Some of these programs require agreements with a service provider other than Moneris Solutions. Please ensure that the necessary agreements are in place before attempting to enable those programs on the terminal.

- Chip Cards
- Contactless Cards
- Signatureless Transactions
- Tip Processing
- Cashback (Debit transactions)
- Clerk IDs and Clerk Sub-Totalling
- Invoice Number Prompting
- Personalized Receipts
- PAN Fraud Control
- Manager Password
- Multi-Terminal Reporting
- Private Label Cards
- Corporate Cards
- Ernex Gift Program
- Ernex Loyalty Program
- Moneris Gift Program
- Moneris Loyalty Program

2.2.1. Chip Cards

Cards with a chip in them, called "chip cards," must be inserted into the chip card reader and left in the reader for the entire transaction. The terminal will prompt you when it is time to remove the chip card from the chip card reader.

Chip cards can be customized by the card issuer to have different applications and methods of verifying the cardholder, so different chip cards may have different prompts. Some prompt for a PIN (like a debit card), while others prompt for a signature on the receipt (like a magnetic stripe credit card).

If the chip card prompts for a PIN, the cardholder must enter their PIN. If the PIN is wrong, they will be prompted to retry. If they forget their PIN, cancel the transaction, request another form of payment and direct the cardholder to contact the card issuer.

Note: Not all chip card types are currently supported. If you insert an unsupported chip card, you will be prompted to swipe the card. If you swipe a supported chip card, you will be prompted to insert the chip card.

If the transaction cannot be completed with the chip card, request another form of payment, and tell the cardholder to contact the card issuer.

As a best practice, always look for "VERIFIED BY PIN" on the Merchant copy of the receipt. If "VERIFIED BY PIN" appears, no signature is required. If a signature line appears, the cardholder MUST sign the receipt.

Identifying a Chip Card

Every time a cardholder presents a card:

2.2.2. Contactless Cards

If an optional modular contactless reader is connected to the Vx810 Duet terminal and your merchant account is configured for it, you can process transactions with contactless cards. Customers can simply tap or wave their card in front of a contactless reader and a transaction is completed in seconds with no signature verification or PIN entry.

The Vx810 Duet supports two Contactless Programs: MasterCard PayPass and Visa payWave.

To process a transaction with a contactless card, look for the PayPass and payWave logos. When prompted, the customer taps the card on the contactless reader where the Contactless logo is located.

The card does not need to touch the reader but must be within 0.5 in. (1.1 cm) of it. The card must be tapped or waved by itself (e.g., the customer cannot leave the card in their wallet and wave it in front of the reader).

If the card does not work or is unsupported:

- If the card is also a chip card, insert it into the chip card reader.
- If that doesn't work, try swiping the card on the magnetic stripe card reader (look for the magnetic stripe).

To configure the modular contactless reader, see Configuring the Contactless Reader.

To set up the modular contactless reader, see The Modular Contactless Reader.

2.2.3. Signatureless Transactions

A "signatureless" transaction is a swiped or tapped Purchase for which a cardholder signature is not required because the Purchase amount is at or below the card's maximum Signatureless Dollar Value (SDV). Depending on the card type and how your terminal is configured, receipts may or may not print for a signatureless transaction.

Maximum Signatureless Dollar Value (SDV)

To determine the maximum SDV for a card, print an EMV Parameters Report and locate the **Contactless CVM Limit** parameter under the report's section for the card. An SDV of **9999** means there is no maximum limit.

See Signing Credit Card Receipts.

2.2.4. Tip Processing

Tip Processing on the Vx810 Duet has a number of features.

Basic Tip Processing

You can configure the terminal to prompt customers for a tip amount on Purchase, Pre-Authorization Completion and Advice transactions. If the customer enters a tip amount greater than 0, the amount is printed on the receipt below the base amount. For tip amount entry by customers on receipts, Basic Tip Processing prints a blank tip line below the base amount on Pre-Authorization receipts.

Note: Tip Processing is skipped on Signatureless Transactions.

Enhanced Tip Processing

This feature gives customers the option of keying in an amount or a percentage when prompted for a tip on Purchases. If a customer opts for a percentage, the terminal displays up to three pre-configured selectable percentage amounts. You can also configure your terminal to give customers a **No Tip** option.

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

IMPORTANT: Enhanced Tip Processing is not available if an external PINPad is connected to your terminal.

Gratuity Guidelines

You can configure the terminal to print suggested tip amounts on the Merchant copy of Pre-Authorization receipts. The tip amounts are calculated on the base amount using three pre-configured percentage amounts.

Tip Percentage on Purchases

You can configure your terminal to automatically add a pre-set tip percentage to all Purchase transactions. Tip Percentage is calculated on the base amount and printed on the receipt.

Note: Tip Percentage is skipped on Signatureless Transactions.

IMPORTANT: Tip Processing is not available when an external PINPad is connected to your terminal. On magnetic stripe credit cards, the tip is added automatically WITHOUT customer acceptance.

For customer tip entry procedures, see Entering a Tip Amount.

To configure Tip Processing, see Configuring Tip Processing.

2.2.5. Cashback

This feature gives your customers the option of withdrawing cash from their debit account when they make a Purchase at your place of business. You provide the cash to your customer and your business account is reimbursed for the amount of the Cashback when the Batch Close transaction is processed. Cashback is available only on Debit Purchases.

When customers choose to receive cash back, the terminal prompts them to:

- select a pre-set Cashback amount,
- manually key in another amount, or
- skip Cashback altogether.

IMPORTANT: The choice of manually keying in another Cashback amount is not available when an external PINPad is connected to your terminal. The available selections on the PINPad are four pre-set non-configurable amounts.

Your terminal is configured with three pre-set Cashback amounts ($10, $20, $30), but you can change these to amounts of your choice. You terminal is also configured with a limit that is applied when customers manually key an amount instead of selecting a pre-set amount ($40), but you can change it to an amount of your choice.

For Cashback customer entry procedures, see Entering a Cashback Amount.

To configure the Cashback feature on the terminal, see Configuring Cashback.

2.2.6. Clerk ID Prompting and Clerk Sub-Totalling

This feature allows you to set up individual Clerk IDs on your terminal. Clerk IDs are unique identifiers that a terminal operator keys in when prompted each time he/she performs a transaction.

This allows you to produce Clerk Sub-Totals Reports that track financial totals and number of transactions by clerk. Using this feature also allows you to produce Tip Reports in order to track tip activity by individual clerk.

Each Clerk ID can have one to six alphanumeric characters (punctuation and special characters are not allowed). A maximum of 255 Clerk IDs can be added for one Merchant ID. Once Clerk IDs are set up and associated with your Merchant ID, they can be used on any handheld terminal that has been configured using your Merchant ID.

IMPORTANT: Clerk Subtotals must be cleared on a regular basis (weekly is recommended). If not, the Moneris Host will automatically clear the totals when the number of transactions for a card type processed by a Clerk ID reaches 10,000.

Default Clerk ID

A default Clerk ID can be set up on your terminal to be automatically used on all transactions (no Clerk ID prompting). When this feature is enabled, all transactions performed on that terminal will be added to the Default Clerk ID's totals regardless of which operator performs the transaction.

For the Clerk ID Prompting procedure, see Entering the Clerk ID.

To configure Clerk Mode on your terminal, see Configuring Clerk Mode.

2.2.7. Invoice Number Prompting

This feature enables a prompt to key in an Invoice Number for every Credit and Debit financial transaction. If this feature is enabled, you have the option of entering an Invoice Number or bypassing the prompt by simply pressing **OK** when the prompt appears.

The Invoice Number can be up to 10 characters long and any combination of alphabetic and numeric characters (punctuation and special characters are not allowed).

If a Private Label Card or a Purchasing Card is used, the Invoice Number can be up to 7 characters long only and you cannot bypass the prompt.

For Invoice Number Prompting procedures, see Entering an Invoice Number.

To enable Invoice Number Prompting, see Configuring Invoice Number Prompting.

2.2.8. Personalized Receipts

You can configure your terminal to print receipts with personalized headers and footers. You can configure up to six headers and four footers. The language in which receipt text is printed is based on your terminal's Language Selection configuration.

You can also configure your terminal to print receipts with double-wide characters for amount lines and the Sequence Number and Approval Code lines.

In addition, you can configure your terminal to determine whether a Customer copy of the receipt should be printed after the Merchant copy on credit non-EMV (non-chip) transactions.

To configure your terminal's receipt printing, see Configuring Receipt Printing.

2.2.9. PAN Fraud Control

To reduce the fraudulent use of credit cards, this security feature prompts you to key in the last four digits of a credit card number after the card has been swiped. PAN Fraud Check then compares the keyed-in digits to the information contained in the card's magnetic stripe or chip to confirm that the numbers are valid. If the numbers are invalid, the transaction cannot continue.

This feature is enabled on the Moneris Host.

For PAN Fraud Control procedures, see Responding to Basic Transaction Prompts.

2.2.10. The Manager Password

The Manager Password restricts access to various terminal functions as well as financial transactions that impact your financial account (e.g. refunds and voids).

IMPORTANT: You, the merchant, are solely responsible for the security of the Manager Password at all times. If your Manager Password is compromised, change the password immediately.

There are a number of factors that affect whether the terminal prompts for a Manager Password, including how the terminal is set up on the Moneris Host and how you have configured the use of passwords on the terminal.

Note: On some functions, the "Password:" prompt may still appear regardless of your terminal's configuration.

To change the Manager Password, see Changing the Manager Password.

To configure the use of passwords on your terminal, see Menu and Editing Parameters (Menu Config Menu).

2.2.11. Multi-Terminal Reporting

If you have more than one terminal associated with your Merchant Number operating in one location, Multi-Terminal Reporting allows you to perform a Batch Close and print a Deposit Totals Report on all your terminals or a sub-set of the terminals from a single terminal.

In order to use Multi-Terminal Reporting, you must set up a Terminal Name on each terminal you want to include in the function. At any time, you can add a new Terminal Name or delete a Terminal Name.

IMPORTANT: When doing a multi-terminal Batch Close and running the Multi-Terminal Deposit Totals Report, totals are cleared on the terminal on which the functions are performed, but are NOT cleared on the other associated terminals.

To configure Multi-Terminal Reporting, see Configuring Multi-Terminal Reporting.

To use Multi-Terminal Reporting, see Processing a Multi-Terminal Batch Close and Multi-Terminal Deposit Totals Report.

Terminal Names

If you have more than one terminal operating in one location, you can use this feature to identify individual terminals by assigning a unique alphanumeric name to each terminal.

If you are using Multi-Terminal Batch Close, a Terminal Name must be assigned to each terminal you want to include in Multi-Terminal Reporting and Batch Close.

To enable Multi-Terminal reporting and add/delete Terminal Names, see Configuring Multi-Terminal Reporting.

2.2.12. Private Label Cards

The Private Label feature allows you to offer your customers a credit card that can be used exclusively in your store(s).

Purchases

All standard financial transactions can be processed using a Private Label Card. For example, a Private Label Card Purchase transaction follows the same steps as a regular credit card Purchase with one possible additional step: the "Promo Code:" prompt may appear. Promo codes (or promotion codes) are supplied to you by the Private Label Card Issuer.

Payments

There is one transaction that is unique to Private Label Cards. The Payment transaction is used to apply a dollar amount towards the balance on a cardholder's Private Label Card.

Reporting

Private Label Card transactions appear as a separate card type on all reports that include credit card transactions.

To configure Private Label Cards on the terminal, see Configuring Private Label Cards.

To transact a Payment on a Private Label Card, see Transacting a Payment on a Private Label Card.

2.2.13. Corporate Cards

Corporate Cards (also known as Purchasing Cards) are a special type of credit card that provides enhanced reporting data to help cardholders with cost allocation, tax compliance and account reconciliation.

If the terminal is configured to accept Corporate Cards, it prompts for a Customer Reference Number and tax amounts when a Corporate Card is entered on a transaction. The Customer Reference Number and tax amounts are printed on receipts and also appear on the cardholder's monthly statement from the Corporate Card issuer.

To enable and configure this feature, see Configuring Corporate Cards.

To transact a Purchase on a Corporate Card, see Transacting a Purchase on a Corporate Card.

2.2.14. The Ernex Programs

The Ernex programs allow you to offer your customers an electronic card-based program that is activated and processed through the Moneris Vx810 Duet terminal. There are two programs available:

- **Gift Cards:** This program allows you to offer your customers stored-value gift cards for pre-defined dollar values as well as variable-value cards and rechargeable cards. The program is available for small businesses as the Moneris Gift Card program and as a customized program for national chains.
- **Loyalty Points:** This program allows you to reward customer loyalty by awarding points based on the dollar value of purchases a cardholder makes. The program is available for small businesses as the Moneris Loyalty Card program and as a customized program for national chains.

All transactions, administrative and configuration functions begin at the GIFT & LOYALTY transactions menu.

2.3. Procedures

Listed below are some of the more common procedures followed on the Vx810Duet.

For other, more specific procedures, see Financial Transactions, Admin Transactions, Reports, End-of-Day Procedure and Demo Mode Transactions.

- Powering up the terminal
- Powering down the terminal
- Loading paper in the printer
- Selecting the terminal language
- Taking a manual imprint of a credit card
- **Transaction prompts:**

  Responding to basic transaction prompts

  Entering a tip amount

  Entering a Cashback amount on a debit transaction

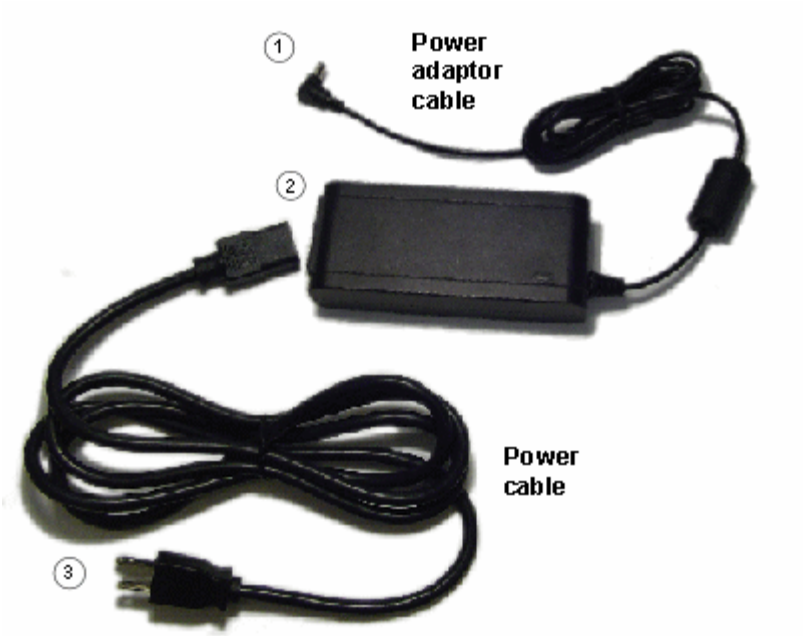
  Entering the Clerk ID

  Entering an Invoice Number

- Receipts:
  - Finding a transaction's Sequence and Orig Auth numbers
  - Signing credit card receipts
  - Reprinting a receipt
  - Printing a cash receipt
- Entering alphabetic characters and punctuation
- Cancelling a transaction
- Cancelling a report
- **Terminal security:**
  - Changing the manager password
  - Requesting a Code 10 Authorization
  - Dealing with disputed debit transactions

2.3.1. Powering Up the Vx810 Duet

The Moneris Vx810 Duet terminal does not have an ON/OFF switch.



The Vx810 Duet 2-part Power Cable

IMPORTANT: You must use the exact power adaptor and cable provided with the terminal base by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to, the terminal and/or charging base.

To power up (or turn on) the terminal base:

1. Plug the power adaptor cable into the power port ( ) on the base.
2. Plug the power cable into the power adaptor.
3. Plug the other end of the power cable into a power source, e.g. a wall jack or a power bar.

The terminal is ready when the applications menu appears.

Note: For power up instructions when an external PINPad is connected to the terminal, see The External PINpad.

2.3.2. Powering Down the Vx810 Duet

The Moneris Vx810 Duet terminal does not have an ON/OFF switch.

To power down (or turn off) the terminal, simply unplug the power cable from the power source, e.g. a wall jack or a power bar. The screen will go blank and the backlight will turn off.

2.3.3. Loading Paper in the Integrated Printer

Paper well open and empty

Paper well open with roll of paper

To load a paper roll into the terminal:

1. Open the paper well at the front of the base.

2. Push the printer latch up and towards the back of the base.

3. Remove the paper roll that is in the paper well.

4. Place the new paper roll into the paper well with the loose end unrolling from the bottom of the roll towards the front of the base.

5. Pull the loose end of the paper towards the front of the base at least one inch (2.2 cm) past the metal teeth at the front of the paper well.

6. Close the printer lid and press firmly on it to ensure that it is securely latched.

7. Tear off the loose end of the paper by pulling it down then sideways across the metal teeth.

8. Press the **3** key to feed paper through the printer and ensure it is working properly.

The printer is ready to print again.

Note: If the printer ran out of paper in the middle of a receipt or report, you may be able to reprint the receipt or report.

2.3.4. Selecting the Terminal Language

The text on the terminal display, receipts and reports can be in one of two languages: English or French. One language can be selected for the Merchant and another for the Customer.

Selecting the Merchant Language

The Merchant Language is used on merchant terminal prompts, the merchant copy of receipts and reports. The language is initially set on the Moneris Host but it can be changed anytime through the CONFIGURATION menu.

IMPORTANT: The language can be changed only AFTER the terminal's first initialization.

To change the Merchant Language:

1. On the applications menu, select **DEBIT & CREDIT**.
The transactions menu appears.

2. Press **OK** to access the CONFIGURATION menu.

3. Scroll down and select **Set Language**.

4. Select **ENG** (English) or **FRN** (French).

5. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

Selecting the Customer Language

The Customer Language is used on customer terminal prompts and customer copies of receipts. By default, the language is the same as the Merchant Language but is set for each individual transaction based on the Language Code on the customer's card. When the terminal detects the code, it switches to that language for the duration of the transaction. When the transaction is complete, the terminal reverts to the Merchant Language.

If a Language Code is not present on the card or if it is neither English nor French, the terminal prompts the customer to select either English or French.

To change the Customer Language on the terminal:

1. You or the customer swipes or inserts the card .

2. At the "Select Language" prompt, the customer selects **ENG** or **FRN**.
The selected language is used for the duration of the transaction.

To change the Customer Language on the PINPad:

1. The customer swipes or inserts the card.

2. At the "SELECT" prompt, the customer selects **ENGLISH** or **FRENCH**.
The selected language is used for the duration of the transaction.

2.3.5. Taking a Manual Imprint of a Credit Card

If the "Imprint Card Press OK Key" prompt appears:

1. Take an imprint of the customer's credit card using the imprinter and the appropriate paper Sales Draft (e.g., a Visa Purchase paper sales draft for a Purchase on a Visa card). Ensure that the Card Number, Issue Date, Expiry Date and Cardholder Name are legible.

2. Print the transaction date and amount on the paper sales draft.

Note: If the transaction amount is over your Merchant Floor Limit, call the Moneris Credit Voice Authorization number to obtain a Voice Authorization Number for the transaction and record the Voice Authorization Number on the paper sales draft.

3a. To process a Purchase, have the cardholder sign the sales draft. Ensure the signature matches the signature on the card. If not, contact the Moneris Merchant Service Centre.

OR

3b. To process a Refund, sign the sales draft yourself.

4. Provide the customer with the Cardholder Copy of the Sales Draft and retain the Merchant Copy for your records.

5. Press **OK** to continue the transaction.

2.3.6. Responding to Basic Transaction Prompts

Merchant Prompts

If this prompt appears ...	Take this action
Customer Press OK to Continue	Pass the terminal to the customer, who follows the prompts.
Return to Clerk	Retrieve the terminal and press **OK** to continue.
Last 4 Digits	Key in the last four digits of the card number and press **OK**.
Exp Date (MMYY)	Key in the card's expiry date (MMYY) and press **OK**.
Validation Code	Key in the three- or four-digit validation code on the back of the card and press **OK**.
Code present?	If the code is not there, select **No**. If the code is not readable, select **Xread**.
Promo Code:	Key in the six-digit Private Label promotion code and press **OK**.

Merchant Prompts on the Terminal with the PINPad

If this prompt appears ...	Take this action
Swipe Card	Pass the PINPad to the customer for card entry.
Approved OK to Continue	Retrieve the PINPad and press **OK** on the terminal to complete the transaction.

Customer Prompts

If this prompt appears ...	Take this action
Customer Press OK to Continue	Press **OK**.
Select Language	Select **ENG** (English) or **FRN** (French).
Select Appl:	Select a displayed application by pressing the corresponding function key (F1, F2, etc.)..
<Application name>-OK?	Select **Yes** to confirm use of the displayed application.
Purchase Amount OK?	Check the Purchase amount and select **Yes** to accept it.
Purchase Total OK?	Check total Purchase + Cashback + Tip Amount and select **Yes** to accept it.
Select Account:	Select **CHQ** (Chequing) or **SAV** (Savings).

If this prompt appears ...	Take this action
Enter PIN & OK:	Key in PIN (Personal Identification Number) and press **OK**.
Remove Card	Remove the chip card from the reader.
Return to Clerk	Return the device to you.

Customer Prompts on the PINPad

If this prompt appears ...	Take this action
Wait for PINPAD (on the terminal)	Follow the prompts on the PINPad.
SELECT	Select **ENGLISH** or **FRENCH**.
SALE OK?	Check the Purchase amount and press **OK** to accept it.
TOTAL OK?	Check total Purchase + Cashback + Tip Amount and select **Yes** to accept it.
PLEASE REMOVE CARD	Remove the chip card from the reader on the PINPad and return the PINPad to you.

2.3.7. Entering a Tip Amount

Basic Tip Processing

If Basic Tip Processing is enabled on the terminal, the customer is prompted as shown below on Purchase, Pre-Authorization Completion and Advice transactions.

On the Standalone Vx810

1. "Tip: $0.00" appears on the terminal.

2a. The customer (or in some cases you) keys in a tip amount to add to the transaction and presses **OK** to continue the transaction with the tip added.

OR

2b. The customer presses **OK** without keying in a tip amount and the transaction continues with no tip added.

With the External PINPad

1. "ADD TIP?" appears on the PINPad.

2a. The customer selects **YES** to add a tip amount to the transaction.

At the "ENTER TIP + OK" prompt, the customer keys in a tip amount and presses **OK** to continue the transaction with the tip added.

OR

2b. The customer selects **NO** and the transaction continues with no tip added.

Note: Tip Processing is skipped on Signatureless Transactions.

Enhanced Tip Processing

If Enhanced Tip Processing is enabled on the terminal, the customer is prompted as shown below on Purchase transactions.

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

IMPORTANT: Enhanced Tip Processing is not available if an external PINPad is connected to your terminal.

1. "Tip Type:" appears on the terminal.

2a. The customer selects **%**.

If three configured suggested percentages appear with an **Other** selection, the customer selects the desired tip percentage OR selects **Other**, keys in a tip percentage and presses **OK** to continue the transaction with the tip added accordingly.

If no tip percentages have been configured on the terminal, the "Tip %:" prompt appears, and the customer keys in a tip percentage then presses **OK** to continue the transaction with the tip added accordingly.

OR

2b. The customer selects **$**.

At the "Tip:" prompt, the customer keys in a tip amount and presses **OK** to continue the transaction with the tip added.

OR

2c. The customer selects **No Tip** (selection is available only if the No Tip option is enabled on the terminal) and the transaction continues with no tip added.

IMPORTANT: Basic Tip Processing must be enabled in order for Enhanced Tip Processing to work.

To configure Tip Processing, see Configuring Tip Processing.

2.3.8. Entering a Cashback Amount on a Debit Transaction

If the Cashback option is enabled on the terminal, the customer is prompted as follows on Debit Purchase transactions.

Standalone Vx810

1. The "Cashback?" prompt appears on the terminal.

2a. The customer selects **Yes**.

Three pre-set amounts appear with an **Other** selection.

If the customer selects a pre-set amount, the transaction continues with the amount added to the Purchase.

If the customer selects **Other**, the "Cash:" prompt appears, and the customer keys in a cash amount then presses **OK** to continue the transaction with the amount added to the Purchase.

If the customer selects **Other** and the keyed in amount exceeds the maximum Cashback allowed, an "Out of range" message appears and the customer is prompted to key in another amount.

OR

2b. The customer selects **No** and the transaction continues with no Cashback amount added.

With the External PINPad

1. The "CASHBACK?" prompt appears on the PINPad.

2a. The customer selects **YES**.

Four pre-set amounts appear, the customer selects the desired amount and the transaction continues with the amount added to the Purchase.

OR

2b. The customer selects **NO** and the transaction continues with no Cashback added.

IMPORTANT: The choice of manually keying in another Cashback amount is not available when an external PINPad is connected to your terminal. The available selections on the PINPad are four pre-set non-configurable amounts.

Note: The Cashback amount is withdrawn from the same account used for the Purchase transaction.

To configure the Cashback option, see Configuring Cashback.

2.3.9. Entering the Clerk ID

If Clerk ID Prompting is enabled, the terminal prompts you as shown below on all transactions.

1. The "Clerk Id:" prompt appears on the terminal.

2. Key in a Clerk ID (1-6 digits) and press **OK** to continue the transaction.

Note: You are required to key in a Clerk ID when prompted for one.

To configure Clerk ID prompting, see Configuring Clerk Mode.

2.3.10. Entering an Invoice Number

If Invoice Number Prompting is enabled, the terminal prompts you for an Invoice ID on credit card and debit transactions.

1. The "Invoice Id:" prompt appears on the terminal.

2a. Key in an alphanumeric Invoice ID up to 10 characters long and press **OK** to continue the transaction.

OR

2b. Press **OK** to bypass the prompt.

Note: If prompted for an Invoice Number during a Corporate Card Purchase transaction, you must key in a number with a maximum of 7 characters..

To configure Invoice Number Prompting, see Configuring Invoice Number Prompting.

2.3.11. Finding a Transaction's Sequence and Orig Auth Numbers

Sequence Number

A transaction's Sequence Number is printed on the receipt for all transactions. The Sequence Number is the first 6 of the last 7 digits of the **Seq #** printed on the receipt. For example, if the **Seq #** on a receipt is **0001234560**, the Sequence Number is **123456**.

The Sequence Number is used to select transactions from the terminal memory to process Corrections, Pre-Authorization Completions and Pre-Authorization Deletions, to reprint receipts and to use the Batch Review function.

To process a Pre-Authorization Completion or Deletion:

- Use the Sequence Number printed on the Pre-Authorization receipt.

Note: If you do not have the Pre-Authorization receipt, print the Pre-Auth Transactions Report to obtain the Sequence Number.

To process a Correction (transaction void):

- Use the Sequence Number printed on the receipt of the transaction you want to void.

Note: If you do not have the original receipt, use the Batch Review function to obtain the Sequence Number.

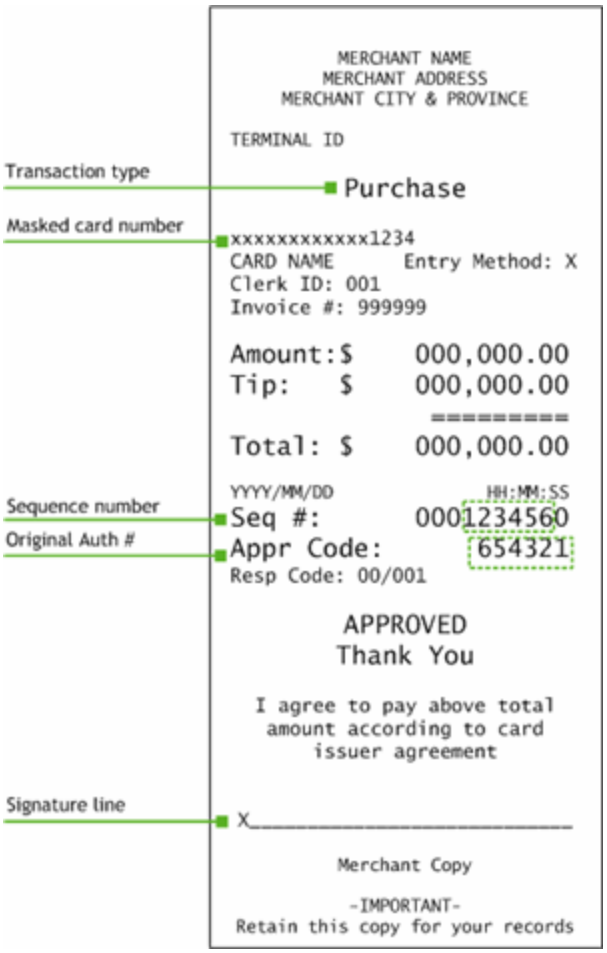
Orig Auth #

A transaction's Orig Auth # is printed on the receipt for all transactions. The Orig Auth # is the 6-digit **Appr Code** printed on the receipt (e.g., **654321**).

The Orig Auth # is used to select transactions from the terminal memory to process Refunds.

To process a Refund:

- Use the Orig Auth # (**Appr Code**) on the receipt of the transaction you want to refund.



2.3.12. Signing Credit Card Receipts

General Guidelines

- If a signature line appears on the Merchant copy of a receipt, the cardholder MUST sign the receipt.
- If NO SIGNATURE REQUIRED or VERIFIED BY PIN appears on the Merchant copy of a receipt, a signature is not required.
- If a signature line appears on the Customer copy of a receipt, you (the merchant) must sign the receipt.

Signatureless Transactions

A "signatureless" transaction is a swiped or tapped Purchase for which a cardholder signature is not required because the Purchase amount is at or below the card's maximum Signatureless Dollar Value (SDV). Depending on the card type and how your terminal is configured, receipts may or may not print for a signatureless transaction.

To configure receipt printing, see Configuring Receipt Printing.

2.3.13. Reprinting Receipts

This function prints a duplicate Merchant copy of receipts.

Note: To have the function print the Customer copy of a receipt as well as the Merchant copy, enable the **Rprnt Cust Copy** parameter (see Configuring Receipt Printing).

To reprint a receipt:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPRINT** key (second **purple** key from the right).
The REPRINT menu appears.

3a. To reprint the Merchant Copy of the last transaction receipt, select **Last Receipt**.

OR

3b. To reprint a different receipt, select **Any Receipt**, key in the transaction's Sequence Number and press **OK**.

The terminal prints the Merchant Copy of the receipt.

Note: On signatureless transactions, this function always prints the Customer copy of the receipt.

4. If the "Prnt Cust Copy?" prompt appears:

a. Select **Yes** to print the Customer Copy of the receipt.

OR

b. Select **No** to return directly to the transactions menu.

2.3.14. Printing a Cash Receipt

Use this function to print a receipt for a cash purchase.

To print a cash receipt:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **9** to print a cash receipt.

If the "Clerk Id:" prompt appears, key in your Clerk ID and press **OK**.

The "Amount: $" prompt appears.

3. Key in the amount of the purchase and press **OK**.

4. If the "Tip: $0.00" prompt appears:

a. The customer can key in a tip amount and press **OK**.

OR

b. You can press **OK** to print a Tip line and Total line on the cash receipt.

2.3.15. Entering Alphabetic Characters and Punctuation

Keying in Alphabetic Characters

1. Press the number key with the character you want to display.

2. Press the **ALPHA** key repeatedly until the character appears on the screen.

To key in this text:	Press these keys on the keypad:
T	**8 ALPHA**
H	**4 ALPHA ALPHA**
A	**2 ALPHA**
N	**6 ALPHA ALPHA**
K	**5 ALPHA ALPHA**
[space]	**0 ALPHA ALPHA**
Y	**9 ALPHA ALPHA**
O	**ALPHA**
U	**6 ALPHA ALPHA**
	ALPHA
	8 ALPHA ALPHA
.	**1 ALPHA**
[period]	

Note: Use the **CORR** key to delete single characters.

Keying in Punctuation and Special Characters

KEY	CHARACTER
1	. (period or dot) \ (backslash)
2	~ (tilde)
3	%
4	@ (at sign)
5	/ (slash)
6	?
7	[
8	]
9	{
*	* (asterisk) , (comma) ' (apostrophe) " (quotation mark) }
0	- (hyphen) (space) + &

KEY	CHARACTER
#	# (pound or number sign) = : $ ^

Note: These are not allowed in Clerk IDs or Invoice Numbers.

2.3.16. Cancelling a Transaction

To cancel a transaction:

- Press **CANC ANNUL**.

The terminal prints the Merchant Copy of the receipt with TRANS CANCELLED on it, if configured, prints the Customer Copy of the receipt with TRANS CANCELLED on it and returns to the transactions menu.

Note: Once the terminal has begun communicating with the Moneris host (i.e., once the "Processing" message is displayed) the transaction can no longer be cancelled.

2.3.17. Cancelling a Report

To cancel a report:

1. Press **CANC ANNUL**.

If the report has begun printing, the terminal stops printing the report and returns to the REPORTS menu.

Note: The Terminal Stats report continues to print until the report is finished.

2. Press **CANC ANNUL** to return to the transaction menu.

2.3.18. Changing the Manager Password

IMPORTANT: For security purposes, we strongly recommend you change your terminal's temporary Manager Password to a secure password of your own. The password should not be changed until after the terminal's first initialization.

To change the Manager Password:

1. On the applications menu, select **DEBIT & CREDIT**.
The transactions menu appears.

2. Press **OK** to access the CONFIGURATION menu.

3. Select **Setup**, key in the current manager password or the temporary password **123456**, and press **OK**.

4. Select **Terminal**.

5. Select **Next** until “Manager Pwd” appears.

6. Select **Edit**, key in your new password and press **OK**.

Note: The password must be 5-10 digits long and must consist of numbers only.

7. Select **Exit** then select **OK** to save changes.

8. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

See The Manager Password.

2.3.19. Requesting a Code 10 Authorization

During a transaction, if you feel that a customer, card or transaction is suspicious and needs investigating, call the Moneris Merchant Service Centre and state that the call is a Code 10. This will alert the Moneris agent without alarming your customer. The operator will ask you some "Yes/No" questions and then provide instructions.

Reasons for calling in a Code 10 include:

- the signature on the credit card does not seem to match the signature on the receipt.
- the card appears to have been tampered with.
- the name on the card is inconsistent with the person’s gender.
- the customer is purchasing an unusual number of expensive items.
- the customer’s purchases seem randomly selected, with little regard for size, quality or value.
- the customer seems nervous or signs slowly with uncertainty.

2.3.20. Dealing With Disputed Debit Transactions

Do not attempt to resolve or compensate a cardholder for a disputed Debit transaction. Refer the Cardholder to their Financial Institution.

3. The Moneris Vx810 Hardware

3.1. The Moneris Vx810 Duet Terminal

The terminal consists of:

- a hand-held terminal with:
  - an integrated PINPad
  - a backlit display
  - a keypad
  - a magnetic stripe reader
  - a chip card reader
- a communications base with:
  - an integrated printer
  - ports for communications and peripherals
  - a power port
- an optional external PINPad
- an optional modular contactless reader

3.2. Setting up the Terminal

Follow these three steps to set up the terminal hardware:

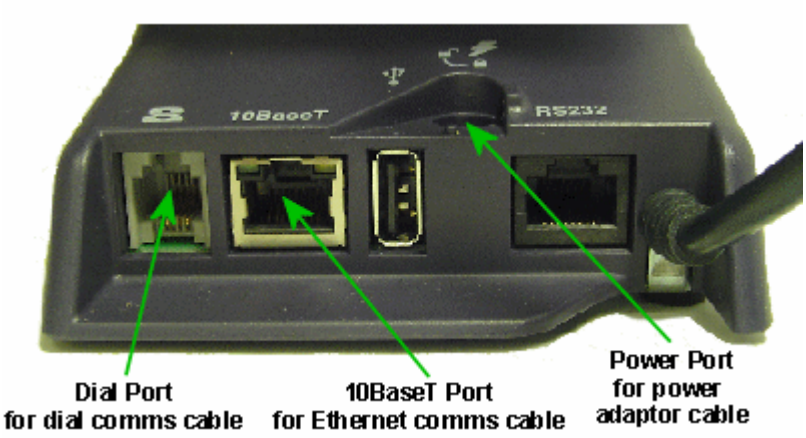
1. Connect the power cable to the base.
2. Connect the communications cable(s) to the base.
3. Check the printer for paper:

   a. From the applications menu, select **DEBIT & CREDIT**.

   b. Press the **3** key to see if paper appears.

Note: If no paper appears, load a paper roll in the printer.

3.3. The Communications Base



The Ports on the Vx810 Duet Communication Base

The Duet communications base has 5 (five) ports:

- - for the dial communications cable
- **10BaseT** - for the Ethernet communications cable
- - DO NOT USE
- - for the power adaptor cable
- **RS232** - for the external PINPad

3.4. The Communications Cables

The Vx810 Duet supports two types of communication, dial and IP, and has a separate port on the Duet base for each type of communications cable.

3.4.1. The Dial Communications Cable

The Dial Communications Cable

1. Plug one end of the dial communications cable into the dial port ( ) on the base.
2. Plug the other end of the dial communications cable into an analog telephone wall jack.

3.4.2. The Ethernet Communications Cable

The Ethernet Communications Cable

1. Plug one end of the Ethernet communications cable into the 10BaseT port on the base.
2. Plug the other end of the Ethernet communications cable into an Ethernet wall jack or a router.

When the terminal is not performing any transactions or functions, and has been idle for a pre-set period of time, the terminal will display the applications menu.

3.5. The Terminal Keypad

The Vx810 Duet Keypad and Purple Function Keys

The terminal keypad contains alphanumeric keys and function keys.

3.5.1. Alphanumeric Keys

These keys allow you to enter amounts for transactions, text for receipt messages and selection criteria for reports. Some alphanumeric keys also act as function keys (see below).

3.5.2. The Function Keys

NAME	ALLOWS YOU TO...
F1 to F4	• select the option displayed on the right-hand side of the display screen beside the function key
Purple keys	• select the icon displayed on the bottom of the display screen above the purple key

NAME	ALLOWS YOU TO...
Arrow Key	• scroll down or up. • The first purple key on the left, located under the arrow icon ( ).
Reprint Key	• launch the REPRINT menu. The second purple key from the right.
Reports Key	• launch the REPORTS menu. The first purple key on the right.
ALPHA	• enter alphabetic characters for personalized receipt text, Clerk IDs, etc. Located in the middle of the row of purple keys.
CANC ANNUL	• cancel a transaction, • return to the transaction menu after completing a transaction and • return to the previous menu when performing ADMIN functions. The red key located at the bottom left of the keypad.
CORR	• clear the last character or number entered (by the cardholder or the merchant), • return to the previous cardholder prompt if no value is currently displayed for the cardholder prompt, • clear the value displayed when a prompt is first displayed and • change the direction of the arrow icon above the 1st purple function key. The yellow key located at the bottom centre of the keypad.
OK	• confirm the data input is complete, • confirm the data displayed is correct and • display the CONFIGURATION menu if pressed when the terminal is at the transactions menu. The green key located at the bottom right of the keypad.
3	• advance the paper in the printer.
6	• access the Quick Setup menu.
9	• print a Cash Receipt.
* (asterisk)	• return to the applications menu.

3.6. The Magnetic Stripe Card Reader

The Magnetic Stripe Reader (MSR) is located in a slot on the right-hand side of the terminal. When a card is swiped, the MSR reads the information encoded on the card's magnetic stripe.

To swipe a card, the magnetic stripe must be down and facing towards the terminal. Cards can be swiped from the back of the terminal forwards or from the front of the terminal backwards.

3.7. The Chip Card Reader

The chip card reader is located in a slot in the front of the terminal. When a chip card is inserted, the chip card reader reads the information on the card's chip (e.g., whether to prompt for a PIN or print a signature line on the receipt).

To correctly insert the chip card into the chip card reader:

1. Ensure that:

    a. the card is facing up

    AND

    b. the chip end of the card is pointing towards the terminal's chip card reader slot.

2. Slide the card into the chip card reader slot until the card stops sliding in.

Inserting a Chip Card in to the Chip Card Reader

IMPORTANT: Leave the chip card in the reader for the entire transaction.

3. When the "Remove Card" prompt appears, pull the card gently out of the chip card reader.

3.8. The Integrated Printer

A thermal printer is integrated with the Moneris 810 Duet base. It prints black text on white, one-part thermal paper.

To order additional paper rolls, see Assistance. To load a paper roll in the printer, see Loading Paper in the Printer.

3.9. The External PINpad

If you ordered the optional Vx810 external PINPad, please confirm that you have received the PINPad and the attached PINPad power cable.

If an optional Vx810 external PINPad is connected to the Vx810 Duet and your merchant account is configured for it, customers must use the PINpad during transactions requiring their input to key in information while you keep the terminal in front of you.

3.9.1. Setting up the External PINpad

1. Locate the PINPad cable (attached to the external PINPad).

2. Plug the RS232 connector into the **RS232** port on the back of the terminal base. Plug the power connector into the power port (⚡) on the back of the base in the unlock position. Turn the plug counter-clockwise to put it in the lock position.

3. Locate the power cable and the power adaptor cable. Plug the power cable into the power adaptor cable. Plug the other end of the power adaptor cable into the power port box in the middle of the PINPad power cable. Insert the connector at a right angle to the box then turn it counter-clockwise to lock it in place.

4. Plug the other end of the power cable into a power source.

Recommendations: Always plug the power cable into the power source last to avoid power surges. Use a power bar with surge protection where possible.

IMPORTANT: You must use the exact power adaptor and cables provided by Moneris Solutions to work with the Moneris Vx810 terminal and PINPad. Failure to do so may affect the operability of or cause damage to the equipment.

5. While the terminal and PINPad are powering up, wait until you see “WELCOME/BONJOUR” on the PINPad and “No AIDs Found” on the terminal.

6. Press **OK** on the PINPad and wait for the applications menu to appear (**DEBIT & CREDI**T, **GIFT & LOYALTY**).

3.9.2. Transactions With the PINPad

1. Begin the transaction on the Vx810 Duet terminal.

2. When "Swipe Card:" appears on the terminal, pass the PINPad to the customer for card entry (see Procedures).

3. When "Wait for PINPad" appears on the terminal, the customer follows the prompts on the PINPad.

4. When "Approved OK to Continue" appears on the terminal, retrieve the PINPad, press **OK** on the terminal and complete the transaction on the terminal following the prompts.

3.10. The Modular Contactless Reader

If an optional modular contactless reader is connected to the Vx810 Duet terminal and your merchant account is configured for it, you can process contactless transactions. In a contactless transaction, the customer taps a contactless card on the contactless reader instead of swiping or inserting it.

Note: If an optional external PINPad is connected to the Vx810 Duet, the contactless reader is connected to the PINpad instead of to the terminal.

3.10.1. Contactless Transactions Allowed

Contactless cards can be tapped on a contactless reader for credit Purchases and Refunds only if the amount is at or below the maximum Contactless Dollar Value (CDV).

3.10.2. Maximum Contactless Dollar Value (CDV)

To determine the maximum CDV for a card, print the EMV Parameters Report and locate the **Contactless Trans Limit** parameter under the report's record for the card. A CDV of **9999** means there is no maximum limit.

4. Configuring Your Terminal

Your Vx810 Duet terminal can be set up to accept and process a variety of cards including debit cards, credit cards, Private Label credit cards, and Corporate (a.k.a. Purchasing) credit cards. The terminal can also be set up to support gift card programs and loyalty programs.

Before you begin using your terminal to process transactions, you must configure it, inputting any special values and parameters needed for the options you want to use. Before you start, ensure you have the following information available:

- your Merchant ID
- your Terminal ID

1. Configure the communications parameters.

2. Configure your Merchant ID and Terminal ID.

2. If applicable, configure the optional external PINPad.

3. If applicable, configure the optional modular contactless reader.

4. Select the standard features and the optional features you intend to use on the terminal.

5. Configure the selected features:

   - Receipt printing
   - Tip Processing
   - Cashback
   - Clerk IDs and Clerk Sub-Totalling
   - Invoice Prompting
   - Multi-Terminal Reporting
   - Private Label Cards
   - Corporate Cards

   Note: Some terminal parameters can be edited using the Quick Setup menu (see below).

6. Initialize your terminal.

7. Print a Terminal Parameters Report.

4.1. Using Quick Setup

The Quick Setup menu provides quick access to a number of popular terminal configuration parameters. See the list of parameters below.

To access Quick Setup:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. From the transactions menu, press **6**.
The "Password:" prompt appears.

3. Key in the manager password and press **OK**.
The first Quick Setup menu appears.

4.1.1. Options for Each Parameter

- **View** (display and edit parameters)
- **Print** (print a list of parameters in the sub-menu and their current values)

4.1.2. Parameters

These parameters can also be found on other menus. For instructions on editing the parameters, refer to the section for the menu indicated in parentheses beside the parameter.

Phone

PABX Code (also found in the Edit Terminal menu)

MONC Primary (also found in the Edit CPT menu as Pri Auth Phone)

MONC Secondary (also found in the Edit CPT menu as Sec Auth Phone)

MONC Settle (also found in the Edit CPT menu as Pri Sett Phone)

MONC Sec. Settle (also found in the Edit CPT menu as Sec Sett Phone)

Blind Dial (also found in the Edit CPT menu)

Terminal

MONC Term Id (also found in the Edit Format menu)

MONC Merch Num (also found in the Edit Format menu)

Tip Processing (also found in the Edit Terminal menu)

Clrk/Srvr Mode (also found in the Edit Terminal menu)

Customer Copy (also found in the Receipt Parameters menu)

Header Line 1 to 6 (also found in the Receipt Parameters menu and the Edit MIT menu)

Terminal Beep (also found in the Edit Terminal menu)

Communications

Do Not Use

IP Hosts

Pri Auth URL (also found in the Edit ECT menu)

Pri Auth Port (also found in the Edit ECT menu)

Sec Auth URL (also found in the Edit ECT menu)

Sec Auth Port (also found in the Edit ECT menu)

Pri Sett URL (also found in the Edit ECT menu)

Pri Sett Port (also found in the Edit ECT menu)

Sec Sett URL (also found in the Edit ECT menu)

Sec Sett Port (also found in the Edit ECT menu)

4.2. Configuring Communications

The terminal can communicate with the Moneris host over Ethernet and dial communications.

- Dial communications
- IP communications with dynamic addressing
- IP communications with static addressing
- Dial backup support for IP communications

IMPORTANT: You must contact Moneris before changing from one communications type to another. Changes may be required on the Moneris Host to allow the terminal to communicate successfully using the new communications type.

4.2.1. Configuring Dial Communications

If your terminal will communicate with the Moneris Host over a standard analog telephone line, you must set up these parameters.

WARNING: Due to data security issues, terminals using dial communications must use a true analog phone line connecting to a public switched telephone network. Analog telephone adaptors (ATAs) and digital phone service over IP communications (e.g. VoIP) must NOT be used as an alternative to dial communications.

Moneris recommends installing a dedicated telephone line for the terminal to ensure transactions are processed quickly and reliably. Sharing the line with another device (e.g., a fax machine) can cause communications problems. Line splitters and filters are not recommended.

Note: The dial communications cable must be connected before attempting to communicate with the Moneris Host.

1. Ensure the dial cable is connected to the base and an analog telephone wall jack.
2. Set the Comm Link Typ parameter:

   a. On the applications menu, select **DEBIT & CREDIT**.
   The message "Activating App..." is displayed then the transactions menu appears.

   b. Press **OK** to access the CONFIGURATION menu.

   c. Select **Setup**, key in the manager password and press **OK**.

   d. Scroll down and select **Host**.
   "Comm Link Typ" appears on the Edit Hosts menu.

   e. Make sure **Comm Link Typ** is set to **Dial**. If yes, skip to step g. If no, proceed to step f.

   f. Select **Edit**, select **Next** until **Dial** appears then select **Slct**.

   g. Select **Exit**. If prompted to save changes, select **OK**.

   h. Press **CANC ANNUL** then press the * (**ASTERISK**) to return to the applications menu.
3. If you need to dial a prefix (e.g., a 9) to connect to an outside line:

   a. On the applications menu, select **DEBIT & CREDIT**.
   The message "Activating App..." is displayed then the transactions menu appears.

   b. Press **OK** to access the CONFIGURATION menu.

   c. Select **Setup**, key in the manager password and press **OK**.

   d. Scroll down and select **Terminal**.

   e. Select **Next** until "PABX Code" appears.

f. Select **Edit**, key in the prefix number (e.g., 9) then press **OK**.

g. Select **Exit** then select **OK** to save changes.

h. Press **CANC ANNUL** then press the * (**ASTERISK**) to return to the applications menu.

4. Enter the initialization phone number:

a. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

b. Press **OK** to access the CONFIGURATION menu.

c. Select **Setup**, key in the manager password and press **OK**.

d. Scroll down and select **Comm** then select **Next** until "Pri Init Phone" appears.

e. Select **Edit**, key in the initialization phone number as follows then press **OK**.

If your merchant number begins with:	**Key in:**
00301	1-888-699-7299
00302	1-888-358-8602
00304	1-888-332-8433

f. Select **Exit** then select **OK** to save changes.

g. Press **CANC ANNUL** then press the * (**ASTERISK**).

4.2.2. Configuring Dynamic IP Communications

If your terminal will communicate with the Moneris Host over the Internet using Public IP with dynamic IP addressing, you must set up these parameters.

Note: If the terminal is configured to use Ethernet communications and dial backup is available, the terminal will attempt to use dial communications when Ethernet communication is not available.

Note: The terminal's MAC address can be found on the yellow sticker on the bottom of the Duet base.

1. Ensure the Ethernet cable is connected to the base and the wall jack.

2. Set the Comm Link parameters:

a. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

b. Press **OK** to display the CONFIGURATION menu.

c. Select **Setup**, key in the manager password and press **OK**.

d. Scroll down and select **Host**.

e. Scroll to the following parameters and edit them:

Comm Link Type - set to "CommServer".

Settle Comm Type - set to "CommServer".

If you wish to configure dial backup, set the Backup Support parameter to "Auto Backup" or "Prompt Backup" (see “Configuring Dial Backup Support for IP” below). If dial is set up as backup, the terminal will attempt to use dial communications when Ethernet communication is not available.

f. Select **Exit** then select **OK** to save changes.

g. Press **CANC ANNUL** then press the * (**ASTERISK**) to return to the applications menu.

3. Set the dynamic IP Settings parameters:

   a. While the applications menu is displayed, press the **2** key.

   b. Key in the manager password and press **OK**.

   c. Press the **Ethernet Config** key ( ) then select **IP**. "IP Settings" appears.

   d. Select **Edit** then select **DHCP**.

   e. Select **Exit** then select **Yes** to save changes.
   CommServer restarts and the terminal reboots back to the applications menu.

4.2.3. Configuring Static IP Communications

If your terminal will communicate with the Moneris Host over the Internet using Public IP with static IP addressing, you must set up these parameters.

Note: If the terminal is configured to use Ethernet communications and dial backup is available, when Ethernet communication is not available the terminal will attempt to use dial communications.

Note: The terminal's MAC address can be found on the yellow sticker on the bottom of the Duet base.

1. Disconnect the Ethernet cable from the base BEFORE completing these steps.

2. Set the Comm Link parameters:

   a. On the applications menu, select **DEBIT & CREDIT**.
   The message "Activating App..." is displayed then the transactions menu appears.

   b. Press **OK** to display the CONFIGURATION menu.

   c. Select **Setup**, key in the manager password and press **OK**.

   d. Scroll down and select **Host**.

   e. Scroll to the following parameters and edit them:

   Comm Link Type - set to "CommServer".

   Settle Comm Type - set to "CommServer".

   If you wish to configure dial backup, set the Backup Support parameter to "Auto Backup" or "Prompt Backup" (see “Configuring Dial Backup Support for IP” below). If dial is set up as backup, the terminal will attempt to use dial communications when Ethernet communication is not available.

   f. Select **Exit** then select **OK** to save changes.

   g. Press **CANC ANNUL** then press the * (**ASTERISK**) to return to the applications menu.

3. Set the static IP Settings parameters.

   a. At the applications menu, press the **2** key.

   b. Key in the manager password and press **OK**.

   c. Press the **Ethernet Config** key ( ) then select **IP**. "IP Settings" appears.

   d. Select **Edit** then select **Static**.

   e. If your Ethernet network requires the parameters listed below, perform steps f and g for each parameter. Otherwise skip to step h.

   f. Select **Next** to view these parameters.

   g. Select **Edit** to key in the address for each of these parameters. To key in a period (.), press the number **1** key then the **ALPHA** key twice. Contact your Internet Service Provider (ISP) to determine the addresses.

IP Address

Subnet Mask

Gateway IP Add

DNS1 IP Address

DNS2 IP Address (your Ethernet network may not require this parameter)

h. Select **Exit** then select **Yes** to save changes. CommServer restarts and the terminal reboots back to the applications menu.

4. Reconnect the Ethernet cable to the base and the wall jack.

4.2.4. Configuring Dial Backup Support for IP

Dial Communications as Automatic Backup for IP

With this configuration, the terminal will automatically attempt to use dial communications when Ethernet communication is not available.

1. Finish setting up communications for IP as above.

2. Plug in the dial cable and follow the steps for Dial Setup under Configuring Dial Communications.

Note: Dial communications must be configured for Dial Backup to work.

3. On the applications menu, select **DEBIT & CREDIT**.

4. Press **OK** to access the CONFIGURATION menu.

5. Select **Setup**, key in your manager password and press **OK**.

6. Scroll down and select **Host**.

7. Select **Next** until “Backup Support” appears.

8. Select **Edit**, select **Next** until “Auto Backup” appears then select **Slct**.

9. Select **Exit** then select **OK** to save changes.

10. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

Other Backup Support Options

None - Dial backup is disabled (default)

Prompt Backup - The terminal prompts for confirmation before attempting dial

Switch Backup - Do Not Use

Use Backup - Do Not Use

4.3. Configuring Your Merchant ID and Terminal ID

To configure your Merchant ID and Terminal ID:

1. On the applications menu, select **DEBIT & CREDIT**.
"Activating App" appears followed by the transactions menu.

2. Press **OK** to access the CONFIGURATION menu.

3. Select **Setup**, key in the manager password and press **OK**.

4. Scroll down and select **Merchant**.
“Term Id” appears.

5. Select **Edit**, key in the Terminal ID (the eight-digit number starting with 28 found on the back of the terminal, e.g. 28123456) and press **OK**.

6. Select **Next** until “Merch Num” appears.

7. Select **Edit**, key in your 13-digit Moneris Merchant ID (e.g. 0030212345678) and press **OK**.

Note: Your Moneris Merchant ID was provided to you when Moneris contacted you to confirm your terminal order. If you currently have a 9-digit merchant number beginning with a 1, 2 or 4, simply add 0030 to the beginning (i.e., 123456789 becomes 0030123456789).

8. Select **Exit** then select **OK** to save changes.

9. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

4.4. Configuring the External PINPad

If you have set up an external PINPad for use with your terminal, follow the instructions below to configure it on your terminal.

IMPORTANT: You must configure the external PINPad on your terminal BEFORE you initialize your terminal for the first time.

To configure the external PINPad:

1. On the applications menu, select **DEBIT & CREDIT**.
"Activating App" appears followed by the transactions menu.

2. Press **OK** to access the CONFIGURATION menu.

3. Select **Setup**, key in the manager password and press **OK**.

4. Select **Terminal**. “Pin Baud” appears on the Edit Terminal menu.

5. Select **Edit**, key in **5** and press **OK**.

6. Select **Next** until “Pin Format” appears.

7. Select **Edit**, key in **4** and press **OK**.

8. Select **Next** until “PINpad Type” appears.

9. Select **Edit** then select **Next** until “SC5000EMV” appears.

10. Select **Slct**. The “Initialize PINpad” message appears.

11. Select **Exit** and press **OK**.

12. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

4.5. Configuring the Modular Contactless Reader

If you have set up an optional modular contactless reader for use with your terminal, follow the instructions below to configure it on your terminal.

To configure the contactless reader:

1. On the applications menu, select **DEBIT & CREDIT**.
"Activating App" appears followed by the transactions menu.

2. Press **OK** to access the CONFIGURATION menu.

3. Select **Setup**, key in your manager password and press **OK**.

4. Select **Next** until “Enable CTLS” appears.

5. Make sure “Enable CTLS” is set to **On**. If yes, skip to step 7. If no, proceed with step 6.

6. Select **Edit** then select **On**.

7. Select **Exit**. If prompted to save changes, press **OK**.

8. Press **CANC ANNUL** then press the * (**ASTERISK**) key to return to the applications menu.

4.6. Configuring Receipt Printing

There are several parameters you can edit to configure what your receipts will look like and how they will print.

For receipt-related procedures, see Finding Sequence and Orig Auth Numbers, Signing Credit Card Receipts, Reprinting Receipts and Printing a Cash Receipt.

4.6.1. Enable the Printer

Use the Enable Printer parameter to enable/disable the integrated printer. The printer is enabled by default.

4.6.2. Configure Receipt Headers and Footers

Use these parameters to configure the lines of text you want to appear at the top of your receipts: Header Line 1, Header Line 2 to 5, Header Line 6.

Use these parameters to configure the lines of text you want to appear at the bottom of your receipts: Footer 1 to 3, Footer 4.

All the parameters are blank by default.

4.6.3. Enable Large Amount Printing

Use the Large Amt Print parameter to enable/disable printing of double-wide characters for amount lines and the Sequence number and Approval Code lines.

4.6.4. Enable Printing of Customer Copies

Use the Customer Copy parameter to enable/disable and configure printing of Customer copies of receipts from non-chip transactions. By default, the terminal is configured to print Customer copies automatically.

4.6.5. Enable Re-Printing of Customer Copies

Use the Reprnt Cust Copy parameter to enable/disable and configure re-printing of Customer copies of receipts in addition to Merchant copies. Re-printing of customer copies is disabled by default.

4.6.6. Configure the Print Prompt Beep Delay

Use the Prompt Beep Delay parameter to configure the number of seconds you want the terminal to wait before printing the Customer copy after beeping and displaying the "Tear Receipt; Press OK key" prompt.

4.7. Configuring Tip Processing

4.7.1. Basic Tip Processing

To enable Basic Tip Processing:

1. Set the Tip Processing parameter to **On - Prompt**.

2. Set the Tip % nn.nn parameter to **0**.

Note: Tip Processing is skipped on Signatureless Transactions.

4.7.2. Enhanced Tip Processing

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

IMPORTANT: Enhanced Tip Processing is not available if an external PINPad is connected to your terminal.

To enable Enhanced Tip Processing:

1. Set the EnhancedTipProc parameter to **On**.

2. Set the Tip Processing parameter to **On - Prompt**.

IMPORTANT: Basic Tip Processing must be enabled in order for Enhanced Tip Processing to work.

To enable the No Tip option:

1. Make sure Enhanced Tip Processing is enabled.

2. Set the TipNone parameter to **On**.

To configure the suggested tip percentage amounts:

1. Make sure Enhanced Tip Processing is enabled.

2. Set any of the Sug Tip% 1 nn, Sug Tip% 2 nn and Sug Tip% 3 nn parameters to the desired percentage amount (e.g., for 15%, key in **15**).

Note: If all three parameters are set to **0**, the customer is prompted for a percentage amount if he/she selects the percentage option on tip prompting.

4.7.3. Gratuity Guidelines Printing on Pre-Authorization Receipts

To enable printing of Gratuity Guidelines:

1. Set the Gratuity Guide? parameter to **On**.

2. Set all of the Sug Tip% 1 nn, Sug Tip% 2 nn and Sug Tip% 3 nn parameters to a value greater than 0 (e.g., for 15%, 20% and 30%, key in **15**, **20** and **30**).

3. Set the Tip Processing parameter to **On - Prompt**.

Note: Both the Enhanced Tip Processing feature and the Gratuity Guidelines feature make use of the Sug Tip% parameters when enabled. However, these features operate independently of each other, and you do not need to enable Gratuity Guideline Printing in order for Enhanced Tip Processing to use these parameters.

4.7.4. Tip Percentage on Purchases

To configure Tip Percentage:

1. Set the Tip % nn.nn parameter to a value greater than 0 (e.g., for 15%, key in **1500**).

2. Set the Tip Processing parameter to **On - Prompt**.

Note: Tip Percentage is skipped on Signatureless Transactions.

IMPORTANT: Tip Percentage is not available when an external PINPad is connected to your terminal. On transactions with magnetic stripe credit cards, tip is automatically added WITHOUT customer confirmation.

For Tip Processing customer entry procedures, see Entering a Tip Amount.

4.8. Configuring the Cashback Feature

4.8.1. Cashback Amount Prompting on Debit Transactions

To enable Cashback prompting:

1. Set the CashBack Option parameter to **On**.

2. Make sure the Show CB Choices parameter is set to **On**.

IMPORTANT: The choice of manually keying in another Cashback amount is not available when an external PINPad is connected to your terminal. The available selections on the PINPad are four pre-set non-configurable amounts.

4.8.2. Changing Cashback Amounts

To change the pre-set Cashback amounts:

1. Set any of the Amt 1, Amt 2 and Amt 3 parameters to new amounts of your choice.

2. Make sure the CashBack Option parameter is set to **On**.

4.8.3. Setting the Cashback Limit

To change the pre-set Cashback limit:

- Set the Amt Limit parameter to a new amount of your choice.

For Cashback customer entry procedures, see Entering a Cashback Amount.

4.9. Configuring Clerk ID Prompting and Clerk Sub-Totalling

4.9.1. Clerk ID Prompting

To enable the Clerk ID prompt:

- Set the Clrk/Srvr Mode parameter to **Prompt**.

For the Clerk ID prompting procedure, see Entering the Clerk ID.

4.9.2. Using a Default Clerk ID

To automatically use the same Clerk ID for all transactions (no ID prompting):

1. Set the Clrk/Srvr Mode parameter to **None**.

2. Add the Clerk ID to your terminal (see “Adding Clerk IDs” below).

3. Set the Use Def. Clrk? parameter to **On**.

4. Set the Default Clerk parameter to the Clerk ID added in step 2.

Note: Clerk ID prompting must be disabled in order to use a default Clerk ID. Before setting a Clerk ID as the default, you must add it to your terminal.

IMPORTANT: If you have more than one terminal, you must configure the Default Clerk ID on each terminal individually.

4.9.3. Clerk Sub-Totalling

To enable Clerk Sub-Totalling on your terminal to produce Clerk Sub-Totals Reports:

1. Set the Clrk/Srvr Mode parameter to **Prompt**.

2. Add Clerk IDs as needed (see “Adding Clerk IDs” below).

4.9.4. Adding Clerk IDs (including the Default Clerk ID)

Use this function to add the Clerk IDs to be associated with your Merchant ID. The terminal must communicate with the Moneris Host in order to complete this function.

The Clerk IDs you enter here can be entered at the "Clerk Id" prompt during transactions and will be used in Clerk Sub-Totals Reports.

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Servers**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The CONFIGURE SERVER menu appears.

4. Select **Add Server** to add a Clerk ID.
The "Clerk ID:" prompt appears.

5. Key in the Clerk ID to be added and press **OK**. For help, see Entering Alpha Characters and Punctuation.
The "Clerk ID:" prompt re-appears.

To continue adding Clerk IDs, repeat step 5. You can add a maximum of 20 Clerk IDs at one time.

Note: When 20 Clerk IDs have been entered for addition, the terminal communicates with the Moneris Host to add the Clerk IDs to the host.

6. When all the Clerk IDs have been entered for addition, press **CANC ANNUL**.
The "Send to Host?" prompt appears.

7. Select **Yes** to send the Clerk IDs to the Moneris Host for addition.
The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

8. Press **OK** to return to the CONFIGURE SERVER menu.

9. Press **CANC ANNUL** twice to return to the transaction menu.

4.9.5. Deleting Clerk IDs

Use this function to remove Clerk IDs associated with your Merchant ID. The terminal must communicate with the Moneris Host in order to complete this function.

The Clerk IDs you remove here can no longer be entered at the "Clerk Id" prompt during transactions and cannot be used in Clerk Subtotal Reports.

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Servers**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The CONFIGURE SERVER menu appears.

4. Select **Delete Server** to delete a Clerk ID.
The "Clerk ID:" prompt appears.

5. Key in the Clerk ID to be removed and press **OK**. For help, see Entering Alpha Characters and Punctuation.
The "Clerk ID:" prompt re-appears.

To continue removing Clerk IDs, repeat step 5. You can remove a maximum of 20 Clerk IDs at one time.

Note: When 20 Clerk IDs have been entered for removal, the terminal communicates with the Moneris Host to remove the Clerk IDs from the Host.

6. When all the Clerk IDs have been entered for removal, press **CANC ANNUL**.
The "Send to Host?" prompt appears.

7. Select **Yes** to send the Clerk IDs to the Moneris host for removal.
The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

8. Press **OK** to return to the CONFIGURE SERVER menu.

9. Press **CANC ANNUL** twice to return to the transaction menu.

4.10. Configuring Invoice Number Prompting

When Invoice Number Prompting is enabled, your terminal prompts you for an Invoice Number during Credit Card and Debit transactions ("Invoice Id:").

To enable Invoice Number Prompting:

- Set the Ask Inv Num? parameter to **On**.

For Invoice Number Prompting procedures, see Entering an Invoice Number.

4.11. Configuring Multi-Terminal Reporting

To use Multi-Terminal Reporting, you must set up a Terminal Name on each terminal you want to include in the multi-terminal Batch Close and reporting process (see Processing a Batch Close and Multi-Terminal Deposit Totals Report). You can delete a Terminal Name at any time.

4.11.1. Adding a Terminal Name

Use this function to set up a Terminal Name associated with your Merchant Number on a terminal you want to include in Multi-Terminal Reporting. The terminal must communicate with the Moneris Host in order to complete this function.

1. On the applications menu of the terminal for which you want to add a name, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Terminal Name**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The Term Name Config menu appears.

4. Select **Add Terminal** to add the terminal name.
The "Terminal Name:" prompt appears.

5. Key in the terminal name for this terminal and press **OK**. For help, see Entering Alpha Characters and Punctuation.
The "Send to Host?" prompt appears.

6. Select **Yes** to send the terminal name to the Moneris Host to be added to and associated with your Merchant Number.
The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

8. Press **OK** to return to the Term Name Config menu.

9. Press **CANC ANNUL** twice to return to the transactions menu.

4.11.2. Deleting a Terminal Name

Use this function to delete a terminal's Terminal Name, disassociate the name from your Merchant Number and make the terminal no longer available for Multi-Terminal Reporting. The terminal must communicate with the Moneris Host in order to complete this function.

1. On the applications menu of the terminal whose name you want to delete, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Terminal Name**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The Term Name Config menu appears.

4. Select **Del Terminal** to delete the terminal name.
The "Delete Now?" prompt appears.

5. Select **Yes** to send the terminal name to the Moneris Host to be deleted from and disassociated with your Merchant Number.
The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

6. Press **OK** to return to the Term Name Config menu.

7. Press **CANC ANNUL** twice to return to the transaction menu.

4.12. Configuring Private Label Cards

The terminal does not require additional configuration in order to process Private Label credit cards. However, before using Private Label cards you must:

- Contact Moneris to obtain a list of Private Label card Issuers.
- Contact the Private Label card Issuer and arrange for service from them.
- Notify Moneris that you will be using this service to ensure that your terminal's initialization parameters are updated on the Moneris Host.
- Re-Initialize your terminal.

4.13. Configuring Corporate Cards

4.13.1. Enabling the Corporate Card Feature

To enable the terminal to accept Corporate Cards:

- Set the Commercial On? parameter to **On**.

4.13.2. Enabling Tax Amount Prompting

To enable the terminal to prompt for a tax amount on Corporate Card transactions:

1. Set the Commercial On? parameter to **On**.
2. Set the Process Tax parameter to **On**.
3. Configure the applicable tax type and tax registration number as shown below.

4.13.3. Configuring Tax Type and Tax Registration Numbers

When you enable the terminal to prompt for a tax amount on Corporate Card transactions, you need to configure the type of tax you are required to charge (based on your geographic location) and the related Tax Registration Number(s). This configuration determines the type of tax the terminal prompts for and the number that appears on customer monthly statements.

To configure Tax Type and Tax Registration Numbers:

1. Set the Commercial On? parameter to **On**.
2. Set the Process Tax parameter to **On**.
3. Set the Tax Type parameter to the applicable tax type.
4. In one or more of the Tax_Type parameters, key in the tax registration number as appropriate.

To process a Purchase on a Corporate Card, see Transacting a Purchase on a Corporate Card.

4.14. Initializing Your Terminal

This function sends information about the terminal to the Moneris Host and receives additional parameters and information from the host. The instructions below are for initializing your terminal for the FIRST time. For instructions on performing subsequent initializations, see Re-Initializing Your Terminal.

IMPORTANT: If you have set up an optional external PINPad for use with your terminal, you must configure it on the terminal BEFORE following the initialization instructions below.

To initialize your terminal:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Configure the Terminal ID and your Merchant ID in the terminal (see Configuring Your Merchant and Terminal IDs).

3. Initialize the terminal:

   a. On the applications menu, select **DEBIT & CREDIT**.

   b. Press **OK** to access the CONFIGURATION menu.

   c. Scroll down and select **Initialize**.

   d. When “Retain IDs?” appears, select **Yes**.

e. When “Transmitting…”, “Receiving…” and “Please wait” appear on the terminal, please wait while the terminal communicates with Moneris. When the initialization is finished, “Init Successful” appears then the transactions menu appears.

f. If you have set up and configured an external PINPad, “Restart Required Press OK” appears on the PINPad display. Press **OK** *on the PINPad* and proceed to step g. If you are operating the Vx810 in standalone mode, skip to step 4.

g. When “Transmitting…”, “Receiving…” and “Please wait” appear on the terminal, please wait while the terminal communicates with the Moneris Host and until the re-start is complete. “Init Successful” appears on the terminal and “WELCOME/BONJOUR” appears on the PINPad shortly after. The terminal is then returned to the transactions menu.

4. Do a Host Logon:

   a. On the transactions menu, press **OK** to access the CONFIGURATION menu.

   b. Scroll down and select **Host Logon**.

   c. Key in the manager password and press **OK**.
   “Logon Success” appears then the transactions menu appears.

5. Press the * (**ASTERISK**) key to return to the applications menu.

Your terminal is now ready to process transactions.

5. Financial Transactions

5.1. Card and Transaction Types

A financial transaction involves the transfer of funds between a cardholder's account and your own business account. For example, a credit card Purchase transaction moves funds from the credit cardholder's account to your business account, and a debit card Refund moves funds from your business account to the debit cardholder's chequing or savings account.

The Moneris Vx810 Duet terminal can process various financial transactions on a number of card types. The matrix below displays the supported card types and the transactions each card type supports.

Transaction / Card Type	Magnetic Stripe Cards		Chip Cards		Contactless Cards	Private Label Cards
	Debit	Credit	Debit	Credit	Credit	Credit
Purchase	Y	Y	Y	Y	Y	Y
Refund	Y	Y	Y	Y	Y	Y
Correction (Void)	Y	Y	Y	Y	N	Y
Pre-Authorization	N	Y	N	Y	N	Y
Pre-Authorization Completion	N	Y	N	Y	N	Y
Pre-Authorization Deletion	N	Y	N	Y	N	Y
Advice	N	Y	N	Y	N	N
Payment	N	N	N	N	N	Y

IMPORTANT: It is the merchant's responsibility to ensure that proper card processing procedures are followed at all times. Please refer to your Merchant manuals and the Terms & Conditions of your Merchant Agreement for details.

The Moneris Merchant Operating Manual, covering MasterCard and Visa procedures, is available for free download at www.moneris.net/en/Support/Downloads/MerchantManuals.aspx. Scroll down to the 'Other' section and select "Merchant Operating Manual".

5.2. Transaction General Guidelines

When performing financial transactions, follow these general guidelines:

1. Determine the transaction to be processed (i.e., Purchase, Refund, etc.).

2. Establish the means of payment (i.e., debit or credit).

3. Identify the card entry method and enter the card data on the POS device accordingly (see Card Entry Options).

4. Follow the terminal prompts (see Transaction Procedures).

5. Process receipts (see Signing Credit Card Receipts).

Note: Terminal prompts may vary depending on variables such as terminal setup, merchant setup and card type.

5.3. Card Entry Options

5.3.1. Magnetic Stripe Cards - Swipe

- Look for the magnetic stripe on the back of the card.
- When “Swipe Card:”, “Insert or Swipe Card:” or “Swipe, Tap, or Insert Card:” appears on the terminal or PINPad, swipe the card on the magnetic stripe reader and follow the prompts.

5.3.2. Chip Cards - Insert

- Look for the chip on the card.
- When “Swipe Card:” or “Insert or Swipe Card:” appears on the terminal or PINPad, you or the customer inserts the card in the chip card reader.

  Note: If an optional external PINpad is connected to the Vx810 Duet, the card must be inserted in the external PINPad’s chip card reader.
- When prompted, the customer keys in his/her PIN.
- The chip card must remain inserted in the reader until the “Remove Card” prompt appears on the display.

Note: Unless the device prompts otherwise, do not swipe a chip card even if it has a magnetic stripe.

5.3.3. Contactless Cards - Tap

- Look for the MasterCard PayPass® or Visa payWave™ label on the card.
- When “Swipe, Tap, or Insert Card:” appears on the terminal or PINPad, the customer taps the card on the modular contactless reader.

  Note: The card does not need to touch the reader but must be within 0.5 in. (1.1 cm) of it. The card must be tapped by itself (i.e., not in a wallet).
- If the card does not work or is unsupported, try inserting it in the chip card reader (if it is a chip card) or swiping the card on the terminal.

5.3.4. Manual Entry

See Manually Processing Credit Card Transactions.

5.4. Transaction Procedures

Follow the procedures in this section to process these transactions:

- Purchase
- Refund
- Correction
- Pre-Authorization
- Pre-Authorization Completion
- Pre-Authorization Deletion
- Advice
- Purchase on a Corporate Card
- Payment on a Private Label (Purchasing) Card

- Manual Credit Transactions

5.4.1. Processing a Purchase

Follow the procedure below to process the sale of goods using a debit or credit card.

To process a Purchase:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Purchase**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Key in the Purchase amount and press **OK**.

4. Follow the prompts on the terminal.

   If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

   If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

   If prompted for Tip Entry, see Entering a Tip Amount.

   If prompted for a Cashback amount ("Cashback?"), see Entering a Cashback Amount.

5. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If processing the Purchase on a Private Label Card, you may be prompted for a Promo Code. To process a Purchase on a Corporate Card, see Processing a Purchase on a Corporate Card.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.2. Processing a Refund

Follow the procedure below to credit a customer's account for a previous debit or credit Purchase.

To process a Refund:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Refund**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Key in the Refund amount and press **OK**.

4. When the “ORIG AUTH #:” prompt appears, key in the 6-digit Appr Code printed on the original receipt and press **OK** (see Finding Sequence and Orig Auth Numbers).

5. Follow the remaining prompts on the terminal.

   If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

   If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

6. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If processing the Refund on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.3. Processing a Correction (Void)

Follow the procedure below to correct (void) a previous Purchase or Refund transaction processed on a debit or credit card.

Note: The correction MUST be performed in the same batch as the original transaction.

To process a Correction:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Correction**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

3a. To correct the *last* transaction performed on the terminal:

A. Select **Yes**.

B. Select **Yes** again to confirm the displayed transaction is the one you want to correct.

OR

3b. To correct a *different* transaction:

A. Select **No**.

B1. To retrieve the transaction by Sequence Number, select **Seq#**, key in the 6-digit Sequence Number printed on the original receipt and press **OK** (see Finding Sequence and Orig Auth Numbers).

OR

B2. To retrieve the transaction by card number, select **Acct#**, key in the last 4 digits of the card number and press **OK**.

C. Select **Yes** to confirm the displayed transaction is the one you want to correct.

4. Follow the remaining prompts on the terminal.

If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

5. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If processing the Correction on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.4. Processing a Pre-Authorization

Follow the procedure below to authorize a temporary amount when the final amount of a credit card Purchase is not known.

To process a Pre-Authorization:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Pre Auth**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the Pre Auth menu, select **Pre Auth** again.

4. Key in the Pre-Authorization amount and press **OK**.

5. Follow the prompts on the terminal.

If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

6. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If Tip Processing is enabled, a blank Tip line is printed on the receipt below the base amount. If a signature line is printed on the Pre-Authorization receipt, the cardholder MUST sign the receipt.

7. When the final amount of the purchase is known, process a Pre-Authorization Completion for the final amount using the same card number (see “Processing a Pre-Authorization Completion” below).

Note: If processing the Pre-Authorization on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.5. Processing a Pre-Authorization Completion

Follow the procedure below to complete a Pre-Authorization once the final amount is known.

Note: A Completion must be performed on the same Vx810 terminal using the same card number. The card does not need to be present.

To process a Pre-Authorization Completion:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Pre Auth**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the Pre Auth menu, select **Completion**.

4. Key in the 6-digit Sequence Number printed on the Pre-Authorization transaction’s receipt and press **OK** (see Finding Sequence and Orig Auth Numbers).

   If the message "No Record Found" appears, repeat step 3.

The terminal displays the following information about the Pre-Authorization:

Seq#:
Card Name
Transaction Type
Card Number
Amount

5. Compare the displayed information to the Pre-Authorization's receipt. If the information matches, select **Yes** (to cancel the Completion, select **No**).

Note: If the displayed Pre-Authorization is not the one you want, select **Next** to display the next Pre-Authorization in the terminal memory. Repeat until the transaction you want is displayed.

If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

6. When the Pre-Authorization amount and the "New Amt:" prompt appear:

   a. To change the Pre-Authorization amount, key in the amount and press **OK**.

   OR

   b. To continue the transaction with the original amount, press **OK**.

Note: If Tip Processing is enabled and the cardholder has entered a tip amount on the Pre-Authorization receipt's Tip line and you want the Tip amount printed on a separate line on the Completion's receipt, press **OK** to key in the amount at the Tip prompt as shown below.

7. Follow the remaining prompts on the terminal.

   If prompted for Tip Entry, see Entering a Tip Amount. If you chose to print the Tip amount on a separate line (step 6) above, key in this amount at the Tip prompt.

8. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If processing the Pre-Authorization Completion on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.6. Processing a Pre-Authorization Deletion

Follow the procedure below to delete a Pre-Authorization in the terminal memory before it is completed.

To process a Pre-Authorization Deletion:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Pre Auth**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the Pre Auth menu, select **Del Pre Auth**.

4. Select the method to retrieve the Pre-Authorization you want to delete:

   a. To retrieve by Sequence Number:

      A. Select **Seq #**.

      B. Key in the 6-digit Sequence Number printed on the Pre-Authorization transaction's receipt and press **OK** (see Finding Sequence and Orig Auth Numbers). If the message "No Record Found" appears, repeat step 3.

   OR

   b. To retrieve by Account Number:

      A. Select **Acct#**.

      B. Key in the last 4 digits of the credit card number and press **OK**.

The terminal displays the following information about the Pre-Authorization:

Seq#:
Card Name
Transaction Type
Card Number
Amount

5. Compare the displayed information to the Pre-Authorization's receipt. If the information matches, select **Yes** (to cancel the Deletion, select **No**).

Note: If the displayed Pre-Authorization is not the one you want, select **Next** to display the next Pre-Authorization in the terminal memory. Repeat until the transaction you want is displayed.

6. Follow any remaining prompts.

7. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

Note: If processing the Pre-Authorization Deletion on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.7. Processing an Advice

Follow the procedure below to complete a voice-authorized Purchase on a credit card.

To process an Advice:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. To begin the transaction, select **Advice**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Amount:" prompt, key in the transaction amount and press **OK**.

   If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

   If prompted for an Invoice Number ("Invoice Id:"), see Entering an Invoice Number.

4. Follow the terminal prompts below:

   a. At the “Auth #:” prompt, key in the Voice Authorization Number that you wrote on the paper sales draft when you called the Moneris Merchant Service Centre for Voice Authorization and press **OK**.

   b. At the “Account #:” prompt, key in the card number and press **OK**.

   c. At the “Exp Date (MMYY):” prompt, key in the card’s expiry date and press **OK**.

5. Follow the remaining terminal prompts.

   If prompted for Tip Entry, see Entering a Tip Amount.

6. Process receipts (see Personalized Receipts and Signing Credit Card Receipts).

For details on basic prompts, see Responding to Basic Transaction Prompts.

5.4.8. Transacting a Purchase on a Corporate Card

Follow the procedure below to transact a Purchase on a Corporate Card. Corporate Cards are also referred to as Purchasing Cards.

Note: If Tip Entry has been enabled for credit cards, the cardholder must perform some of the steps. The **bold text** below indicates the additional steps required for a Corporate card transaction.

To transact a purchase on a Corporate Card:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. Select **Purchase**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The "Amount: $ 0.00" prompt appears.

3. Key in the amount of the purchase and press **OK**.

   If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

   If prompted for an Invoice Number ("Invoice #:"), key in the Invoice Number (max. 7 alphanumeric characters) and press **OK**, or simply press **OK** to leave this blank.

The "Swipe or Insert Card:" prompt appears.

4a. Swipe the credit card on the terminal.
If the "Last 4 Digits:" prompt appears, key in the last 4 digits of the card number and press **OK**.

OR

4b. Manually process the transaction:

   A. Key in the card number.
   The "Exp Date (MMYY):" prompt appears.

B. Key in the card's expiry date and press **OK.**
The "Validation Code:" prompt appears.

If the "Imprint Card Press OK Key" prompt appears, you must take a manual imprint of the credit card. For help, see Taking a Manual Imprint of a Credit Card.

C. Key in the validation code found on the back of the card and press **OK**.

If you do not have the validation code, press **OK** and, when the "Code present?" prompt appears, select **No**.

If the "Customer Press OK To Continue" prompt appears, the cardholder must respond to the cardholder prompts. For help, see Entering a Tip Amount.

If the "Select Language" prompt appears, select **ENGL** for English or select **FREN** for French.
The cardholder receipt will be printed in the selected language.

The xST Amt: entry screen appears.

5. Key in the tax amount and press OK, or simply press OK to leave this blank.
The "Reference #:" entry screen appears,

6. Key in the customer reference number (max. 16 alphanumeric characters) and press OK, or simply press OK to leave this blank.

If the "Promo Code:" prompt appears, key in the promotion code (max. 6 alphanumeric characters) supplied to you by the Private Label card provider and press **OK**, or simply press **OK** to leave this blank.

The terminal communicates with the Moneris Host.

7. Please wait while the terminal processes the transaction.
The "APPROVED" message appears.
The "Tear Receipt Press OK Key" message is displayed while the Merchant Copy of the receipt is printed then the terminal begins beeping.

8. Tear off the Merchant Copy of the receipt and give it to the cardholder to sign.

9. Press **OK** to stop the beeping and print the Customer Copy of the receipt, or simply press **CANC ANNUL** to stop the beeping and return to the transactions menu.

If the Customer Copy of the receipt is printed, give it to the cardholder then press **OK** to return to the transactions menu.

5.4.9. Transacting a Payment on a Private Label Card

This transaction allows a cardholder to make a payment towards the balance on their Private Label credit card.

To transact a payment on a Private Label card:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the transactions menu.

2. Select **Payment**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The "Amount: $0.00" prompt appears.

3. Key in the amount of the payment and press **OK**.

If prompted for a Clerk ID ("Clerk Id:"), see Entering the Clerk ID.

If prompted for an Invoice Number ("Invoice #:"), key in the Invoice Number (max. 7 alphanumeric characters) and press **OK**, or simply press **OK** to leave this blank.

The "Swipe or Insert Card:" prompt appears.

4a. Swipe the private label credit card on the terminal.
If the "Last 4 Digits:" prompt appears, key in the last 4 digits of the card number and press **OK**.

OR

4b. Manually process the transaction:

A. Key in the card number.
The "Exp Date (MMYY): prompt appears.

B. Key in the card's expiry date and press **OK.**
The "Validation Code:" prompt appears.

If the "Imprint Card Press OK Key" prompt appears, you must take a manual imprint of the credit card. For help, see Taking a Manual Imprint of a Credit Card.

C. Key in the validation code found on the back of the card and press **OK**.

If you do not have the validation code, press **OK** and, when the "Code present?" prompt appears, select **No**.

If the "Select Language" prompt appears, select **ENGL** for English or select **FREN** for French.
The Customer Copy of the receipt will be printed in the selected language.

If the "Promo Code:" entry screen appears, key in the promotion code (max. 6 alphanumeric characters) supplied to you by the Private Label card provider and press **OK**, or simply press **OK** to leave this blank.

The terminal communicates with the Moneris Host.

5. Please wait while the terminal processes the transaction.
The APPROVED message appears.
The "Tear Receipt Press OK Key" message is displayed while the Merchant Copy of the receipt is printed then the terminal begins beeping.

6. Tear off the Merchant Copy of the receipt and give it to the cardholder to sign.

7. Press **OK** to stop the beeping and print the Customer Copy of the receipt, or simply press **CANC ANNUL** to stop the beeping and return to the transactions menu.

If the Customer Copy of the receipt is printed, give it to the cardholder then press **OK** to return to the transactions menu.

5.4.10. Manually Processing Credit Card Transactions

In order to process credit card Purchases and Refunds manually you must have a paper sales draft for the card type (e.g., a Visa sales draft for a Purchase on a Visa card) and an imprinter. Contact the Moneris Merchant Service Centre to obtain these supplies if you do not have them.

IMPORTANT: Debit transactions CANNOT be processed manually.

To manually process a credit card transaction when the terminal is down:

When the terminal is down, report the problem to the Moneris Merchant Service Centre and use one of the following procedures to complete a credit card Purchase or Refund transaction:

- If the transaction amount is *less* than your floor limit, see “Manually Processing Credit Card Transactions UNDER the Floor Limit” below.
- If the transaction amount is *higher* than your floor limit, “Manually Processing Credit Card Transactions OVER the Floor Limit” below.

Note: Floor limits are established by Moneris. Contact your Moneris account manager for more information.

Manually Processing Credit Card Transactions UNDER the Floor Limit

While the terminal is down:

- Take an imprint of the customer's Credit Card.

When the terminal is functioning properly again:

1. Process a Purchase or Refund transaction on the terminal for the amount on the sales draft. You will need to key in the card number, expiry date and validation code (3 or 4 digit V-code on the back of the credit card).

2. Attach the Merchant Copy of the terminal's receipt to the Merchant Copy of the sales draft and retain the two copies for your records.

Manually Processing Credit Card Transactions OVER Floor Limit

While the terminal is down:

1. Take an imprint of the customer's credit card.

2. Call the Moneris Merchant Service Centre to obtain a Voice Authorization Number for the transaction and record the Voice Authorization Number on the paper sales draft.

When the terminal is functioning properly again:

1. Process an Advice transaction on the terminal for the amount on the sales draft. You will need to key in the card number, expiry date, validation code (3 or 4 digit V-code on the back of the credit card) and Voice Authorization Number.

2. Attach the Merchant Copy of the terminal's receipt to the Merchant Copy of the sales draft and retain the two copies for your records.

6. Admin Transactions

- Logging On
- Logging Off
- Re-Initializing the Terminal
- **Demo Mode**
  - Demo Mode Transactions
  - Entering Demo Mode
  - Exiting Demo Mode

6.1. Logging On

If the "Host Logon Required" prompt appears, you must log on before you can perform transactions on the terminal.

To log on to the terminal:

1. On the applications menu, select **DEBIT & CREDIT**.
The transactions menu appears.

2. Press **OK** to access the CONFIGURATION menu.

3. Scroll down and select **Host Logon**.

4. At the "Password:" prompt, key in the manager password and press **OK**.
The terminal communicates with the Moneris Host, displays "Logon Successful" then returns to the transactions menu.

The terminal is now ready to process transactions. If this is your first time using the terminal, we suggest using Demo Mode to practice performing transactions.

Note: To ensure unauthorized transactions cannot be processed, the terminal should be logged off at the end of the business day.

6.2. Logging Off

To ensure unauthorized transactions cannot be processed, your terminal should be logged off at the end of the business day.

To log off the terminal:

1. On the applications menu, select **DEBIT & CREDIT**.
The transactions menu appears.

2. Press **OK** to access the CONFIGURATION menu.

3. Scroll down and select **Host Logoff**.
The terminal communicates with the Moneris Host, displays "Logoff Successful" then returns to the transactions menu.

Note: To process transactions again, the terminal must be logged on.

6.3. Re-Initializing the Terminal

This function sends information about the terminal to the Moneris Host and receives additional parameters and information from the host.

If changes have been made to your terminal configuration or your merchant account, the terminal may display 'Init Required' or the Merchant Service Centre may call and ask you to re-initialize your terminal.

To re-initialize the terminal:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Scroll down and select **Initialize**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

4. At the "Retain Settings?" prompt, select **Yes**.
The terminal communicates with the Moneris Host (this may take a few minutes). When the initialization is complete, the transactions menu re-appears.

5. If the "Host Logon Required" prompt appears, log on to the terminal (see “Logging On” above).

Note: For instructions on initializing your terminal the first time, see Initializing Your Terminal.

6.4. Demo Mode Transactions

Most transactions can be practiced in Demo Mode on the terminal:

- Financial Transactions
- Reporting Functions
- Administrative Functions
- Shortcuts

When using Demo Mode, keep in mind the following points:

- Transactions that cannot be performed do not appear on the terminal screen while in Demo Mode.
- The terminal can NOT perform a Batch Close in Demo mode. You can clear transactions from the Demo Mode batch by using the Batch Clear function while in Demo Mode or by selecting **Yes** at the "Clear Batch" prompt when you exit Demo Mode.
- Demo transactions are limited to a maximum amount of $1.00.
- If Tip Processing is enabled, the maximum tip amount in Demo Mode is $1.00.
- If Cashback is enabled, the maximum Cashback amount in Demo Mode is $1.00.
- The maximum final total amount (Purchase + Tip + Cashback) is $3.00.

6.4.1. Financial Transactions

The following financial transactions are available during Demo Mode regardless of the type of card used. Purchasing Cards (i.e., Corporate Cards) cannot be used while in Demo Mode.

- Purchase
- Refund
- Correction
- Pre-Authorization

- Pre-Authorization Completion
- Pre-Authorization Deletion
- Advice

6.4.2. Functions

Reporting Functions	*Admin Functions*	*Shortcuts*
Stored Tran Rpt	Reprint	**3** = Paper feed
Deposit Totals	Demo	**6** = Quick Setup
Clerk SubTotals	Batch Review	**9** = Cash Receipt
Multi Terminal	Batch Clear	**OK** = Configuration menu
Merch SubTotals		***** = Applications menu
Terminal Parms		
Terminal Stats		
EMV Param Rpt		
EMV Diagnostics		
Pre-Auth Rpt		

The following Setup functions should NOT be used in Demo Mode although they are available:

- Printer
- Comm
- Host
- Merchant IDs
- IP Hosts
- Date/Time

6.4.3. Entering Demo Mode

Demo Mode can be activated only on terminals that have been configured, initialized and logged on.

IMPORTANT: You must close the current batch before you can enter Demo Mode. Do NOT clear the batch.

Ensure that you exit Demo Mode before processing actual financial transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, financial accounts or customer accounts.

To enter Demo Mode:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Setup**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

4. On the Setup menu, select **Demo**.

5. At the "Demo Mode" prompt, select **On**.

   If the "Batch Not Empty Clear Batch" message appears, the terminal has transactions in terminal memory and you must follow the steps below:

   a. Select **No**. The "TRANS CANCELLED" message appears.

   b. Press **OK** to return to the Setup menu then press **CANC ANNUL** two times to return to the transactions menu.

   c. Perform a Batch Close then try entering Demo Mode again.

IMPORTANT: Do NOT select Yes. If you do, the batch will be deleted and you will lose all transactions in the batch in the terminal memory. You will be unable to close that batch and will be out of balance with the Moneris Host.

The terminal displays "DEMO MODE ON" then the Setup menu re-appears with the DEMO icon ( ) displayed on the left side of the screen.

6. Press **CANC ANNUL** two times to return to the transactions menu.

IMPORTANT: Ensure that you exit Demo Mode before processing actual financial transactions. Transactions processed in Demo Mode will not affect your terminal totals, financial accounts and customers' accounts.

6.4.4. Exiting Demo Mode

To exit Demo Mode:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press **OK** to display the CONFIGURATION menu.

3. Select **Setup**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

4. On the Setup menu, select **Demo**.

5. At the "Demo Mode" prompt, select **Off**.

   If the "Batch Not Empty Clear Batch" message appears, the terminal has Demo transactions in terminal memory and you must do the following:

   - Select **Yes**.
     The terminal displays "BATCH DELETED" and all Demo transactions in the terminal memory are deleted.

The "DEMO MODE OFF" message is displayed then the Setup menu re-appears WITHOUT the DEMO icon displayed on the left side of the screen.

6. Press **CANC ANNUL** two times to return to the transactions menu.

IMPORTANT: All transactions performed on the terminal as of this point will be in normal mode and WILL affect your terminal totals, your financial accounts and your customers' accounts.

7. Reports

- Stored Transactions
- Merchant Sub-Totals
- Clerk Sub-Totals
- Deposit Totals
- Multi-Terminal Deposit Totals
- Pre-Auth Transactions
- Tip
- Batch Totals
- Terminal Parameters
- EMV Parameters
- Private Label Card Transactions on Reports

7.1. Stored Transactions Report

This report prints a detailed list of all transactions for the current batch in the terminal's memory, sorted by date. The report also prints transaction type totals sorted by card type and grand totals sorted by transaction type.

Note: This report does not include Pre-Authorization transactions. These transactions are listed in The Pre-Auth Transactions Report.

To print the Stored Transactions Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the mapager Password and press **OK**.

3. Select **Stored Tran**.
The "Rpt Period:" prompt appears.

4a. To print transactions and totals for a specific date:

a. Select **Date**.

b. At the "Date (YYYYMMDD):" prompt, key in the date and press **OK**.

4b. To print all transactions and totals:

a. Select **All**.

The terminal prints the Stored Transactions report and returns to the REPORTS menu.

5. Press **CANC ANNUL** to return to the transactions menu.

7.2. Merchant Sub-Totals Report

This report prints totals of all transaction types in the current batch on the Moneris Host. Transaction type totals are sorted by card type and grand totals are sorted by transaction type. The report does NOT close the batch.

To print the Merchant Sub-Totals Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Scroll down and select **Merch SubTotals**.
The terminal communicates with the Moneris Host.

4. If the terminal displays "APPROVED," press **OK**.
The terminal prints the report and returns to the REPORTS menu.

5. Press **CANC ANNUL** to return to the transactions menu.

7.3. Clerk Sub-Totals Report

This report prints totals for all transactions in the current batch on the Moneris Host processed by one or more Clerks or by all Clerks. Transaction type totals are sorted by card type and grand totals are sorted by transaction type, by Clerk ID.

Note: Clerk IDs must be set up for your merchant account on the Moneris Host before this report can be used (see Clerk Mode).

IMPORTANT: Clerk Subtotals must be cleared on a regular basis (weekly is recommended). If not, the Moneris Host will automatically clear the totals when the number of transactions for a card type within a Clerk ID reaches 10,000.

7.3.1. For One or More Clerks

To print the Clerk Sub-Totals Report for one or more Clerks:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Select **Clerk SubTotals**.

4. At the "Clerk Id:" prompt, key in the Clerk ID and press **OK**.

Note: You must enter a Clerk ID.

The "Add Another Clerk?" prompt appears.

5a. To print sub-totals only for the keyed-in Clerk ID, select **No**.

OR

5b. To print sub-totals for more Clerk IDs, select **Yes** then repeat steps 4 and 5 for each additional Clerk ID.

6. At the "Clear Totals?" prompt, select **No**.
The terminal communicates with the Moneris Host then prints the report and returns to the first REPORTS menu screen.

7. Press **CANC ANNUL** to return to the transactions menu.

7.3.2. For All Clerks

To print the Clerk Sub-Totals Report for all Clerks:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Select **Clerk SubTotals**.

4. At the "Clerk Id:" prompt, press the (*) **ASTERISK** key then press **OK**.

5. When the "Add Another Clerk?" prompt appears, select **No**.

6. At the "Clear Totals?" prompt, select **No**.
The terminal communicates with the Moneris Host then prints the report and returns to the REPORTS menu.

7. Press **CANC ANNUL** to return to the transactions menu.

7.4. Deposit Totals Report

This report prints totals for all transactions in closed batches on the Moneris Host. Transaction type totals are sorted by card type and grand totals are sorted by transaction type.

To print the Deposit Totals Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the REPORTS menu, select **Deposit Totals**.
The terminal communicates with the Moneris Host.

4. If the terminal displays "APPROVED", press **OK**.
The terminal prints the report and returns to the REPORTS menu.

5. Press **CANC ANNUL** to return to the transactions menu.

7.5. Multi-Terminal Deposit Totals Report

This report prints totals for all transactions in closed batches on the Moneris Host, for all terminals. Transaction type totals are sorted by Terminal Name then by card type; overall transaction type totals are sorted by card type; grand totals are sorted by transaction type.

Note: Terminal Names must be set up for your merchant account on the Moneris Host before this report can be used (see Configuring Multi-Terminal Reporting).

To print the Multi-Terminal Deposit Totals Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. Select **Multi Term**.
The "Terminal Name:" prompt appears.

4a. To print the report for a specific terminal, key in the Terminal Name, press **OK** and proceed to step 5.

OR

4b. To print the report for all terminals, press the (*) **ASTERISK** key, press **OK** and proceed to step 6.

5. At the "Add Another Terminal?" prompt, select **Yes**, repeat step 4 until you have added all the desired terminals (maximum 20) then press **No**.

6. At the "Deposit Ttls" prompt, select **Yes**.
The terminal prints the report and returns to the REPORTS menu.

7. Press **CANC ANNUL** to return to the transactions menu.

7.6. Pre Auth Transactions Report

This report prints details of all open Pre-Authorization transactions in the terminal memory (i.e., Pre-Authorizations that have not been completed).

To print the Pre Auth Transactions Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Pre Auth**.

3. At the Pre Auth menu, select **Pre-Auth Rpt**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The terminal prints the report and returns to Pre Auth menu.

4. Press **CANC ANNUL** to return to the transactions menu.

7.7. Tip Report

This report prints tip activity for a given Clerk or for all Clerks, for a given date or for the current batch. Clerk totals are sorted by card type and totalled for all cards; overall totals for all Clerks are sorted by card type and totalled for all cards.

Note: Tip Processing must be enabled and Clerk IDs must be set up for your merchant account on the Moneris Host before this report can be used (see Tip Processing and Clerk Mode).

To print the Tip Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the REPORTS menu, select **Tip Report**.
The "Clrk Rpt Opt" prompt appears.

4a. To print the report for a specific Clerk, select **One** and proceed to step 5.

OR

4b. To print the report for all Clerks, select **All** and proceed to step 6.

5. At the "Clerk Id:" prompt, key in the Clerk ID and press **OK**.

6. At the "Rpt Period:" prompt:

   a. To print the report for a *specific date*, select **Date** and, at the "Date (YYYYMMDD):" prompt, key in the date and press **OK**.

   OR

   b. To print the report for **all tip activity** in the current batch, select **All**.

The terminal prints the report and returns to the REPORTS menu.

7. Press **CANC ANNUL** to return to the transactions menu.

7.8. Batch Totals Report

This report is printed as part of the Merchant Batch Close process but can be printed WITHOUT closing the batch.

To print the Batch Totals Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Close Type?" prompt, select **Sngl**.
The terminal communicates with the Moneris Host and prints the Batch Totals section of the Batch Close Report.

4. At the "Prt Stored Trans?" prompt, select **No**.

5. At the "Close Batch?" prompt, select **No**.
The terminal displays a "Batch Close Failed" message, finishes printing the report with the message on it and returns to the transactions menu.

7.9. Terminal Parameters Report

This report provides a printout of the current parameter configuration on the terminal. Included in the printout are:

- software revision number (Application ID),
- terminal identification information (Terminal Serial #:),
- PINPad configuration,
- features enabled from the CONFIGURATION menu, including Terminal Parameters, Debit Parameters and Tip Parameters,
- Tip Processing setup (Tip Parameters),
- receipt setup (Receipt Parameters) and
- communications parameters (Dial Parameter and Ethernet Parameters).

To print the Terminal Parameters Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the REPORTS menu, select **Terminal Parms**.
The terminal prints the report and returns to the REPORTS menu.

4. Press **CANC ANNUL** to return to the transactions menu.

7.10. EMV Parameters Report

This report prints a list of EMV parameters and their values by EMV card record number.

To print the EMV Parameters Report:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right).
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. On the REPORTS menu, scroll down and select **EMV Param Rpt**.
The terminal prints the report and returns to the REPORTS menu.

4. Press **CANC ANNUL** to return to the transactions menu.

7.11. Private Label Card Transactions on Reports

Private Label Card transactions appear as a separate card type on all reports that include credit card transactions. These are:

- Stored Transactions
- Merchant Sub-Totals
- Clerk Sub-Totals
- Deposit Total
- Multi-Terminal Deposit Totals
- Batch Review

8. The Ernex Programs

The Ernex programs allow you to offer your customers an electronic card-based program that is activated and processed through the Moneris Vx810 Duet terminal. There are two programs available:

- **Gift Cards:** This program allows you to offer your customers stored-value gift cards for pre-defined dollar values as well as variable-value cards and rechargeable cards. The program is available to small businesses as the Moneris Gift Card program and to national chains as a customized program.
- **Loyalty Points:** This program allows you to reward customer loyalty by awarding points based on the dollar value of purchases a cardholder makes. The program is available to small businesses as the Moneris Loyalty Card program and to national chains as a customized program.

All transactions, and administrative and configuration functions begin at the GIFT & LOYALTY transactions menu.

8.1. Enabling Ernex

To enable an Ernex program on your terminal:

1. Contact Moneris Solutions.

   If you wish to have a gift or loyalty program set up for a national chain, you will also need to contact Ernex.

2. Initialize the terminal to the Moneris Host.

3. Key in the Ernex parameter values:

   a. Key in your Moneris Merchant ID, Moneris Terminal ID and Ernex Terminal ID.

   b. Key in the Ernex device type: **7O** (capital letter “o”).

   c. Key in the Ernex Route Code: **67**.

4. Initialize the terminal to the Ernex Host.

8.2. Ernex Transactions

8.2.1. Activate or Load Value on an Ernex Card

To activate or load additional value on a Moneris gift card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Activate/Load**.
The "Swipe or Enter Card" prompt appears.

3a. Swipe the gift or loyalty card.

OR

3b. Key in the loyalty card number and press **OK**.

The terminal displays the last four digits of the card number.

If the "Enter CVC" prompt appears, key in the 3-digit validation code on the back of the card and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

If the "Enter Amount" prompt appears, key in the dollar amount to be loaded on the card and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**. The terminal displays "Approved".

The terminal displays "Balance Due" then the "Press OK Key" prompt appears.

4. To complete the transaction, follow the steps under “Ernex Transaction With a Balance Due” below.

8.2.2. Ernex Transaction With a Balance Due

Gift card purchases, activations and reloads can be paid for with more than one payment type to cover transactions when there is a balance due. For example, if the total amount due is $50 and a gift card has only $30 remaining on it, the balance due of $20 can be paid for with cash.

When the terminal displays the "Balance Due $###.##" message followed by the "Press OK key" prompt:

1. Press **OK**.
The "Select Payment For Balance Due" prompt appears.

2. Use the terminal’s function keys to select the payment type:

For payment by debit or credit card, select **DbCr**.

For payment by gift card, select **Gift**.

For payment by cash, select **Cash**.

For payment by split tender, select **Splt**.

The terminal displays "Approved" or "Tear Receipt" and prints the Customer Copy of the receipt then displays the "Press OK key" prompt.

3. Press **OK** to print the Merchant Copy of the receipt.

4. If you selected:

DbCr: The terminal begins a Purchase transaction (debit or credit) beginning at the "Swipe or Insert Card" prompt.

Gift: The terminal begins an Ernex Gift Card Purchase transaction beginning at the "Swipe or Enter Card" prompt.

Cash: The transaction is complete.

Splt: The terminal begins a Purchase transaction (debit or credit) beginning at the "Swipe or Insert Card" prompt.

The transaction is completed when the balance due is $0.

8.2.3. Voiding an Ernex Gift or Loyalty Transaction

Follow the procedure below to void a gift or loyalty card transaction.

IMPORTANT: This transaction must be performed in the same batch and for the same amount as the original transaction.

To void an Ernex transaction:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Void**.
The "Password:" prompt appears.

3. Key in the manager password and press **OK**.
The "Swipe or Enter Card" prompt appears.

4. Swipe the gift or loyalty card.

If the "Enter CVC" prompt appears, key in the 3-digit validation code on the back of the card and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The "Ernex Ref Number" prompt appears.

5. Key in the original reference number from the gift card or loyalty card transaction receipt and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt, then the "Press OK key" prompt appears.

6. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.2.4. Ernex Card Inquiry

Display or print a Moneris gift card or loyalty card balance and expiry date.

To process and Ernex card inquiry:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Card Inquiry**.
The "Swipe or Enter Card" prompt appears.

3a. Swipe the gift card or loyalty card.

OR

3b. Key in the gift card number or the loyalty card number and press **OK**.

The terminal displays the last four digits of the card number.

If the "Enter CVC" prompt appears, key in the 3-digit validation code on the back of the card and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The "Card Inquiry 000 Inquiry Complete" prompt appears.

4. Press **OK**.
The terminal displays the Card Balance and Card Status then the "Press OK key" prompt appears.

5. Press **OK**.
The "Print Receipt?" prompt appears.

6. To print the receipt, select **Yes**.
OR
To skip printing the receipt, select **No**.

The terminal returns to the GIFT & LOYALTY transactions menu.

8.2.5. Reprinting an Ernex Receipt

This function prints a duplicate of a gift or loyalty receipt.

To reprint an Ernex receipt:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the reprint key (second purple key from the right).

3. Select the receipt you wish to print:

To print the most recent receipt, select **Last Receipt**.

To print an earlier receipt, select **Any Receipt**.

The "Ernex Ref Number" prompt appears.

4. Key in the reference number and press **OK**.

The terminal reprints the Customer Copy of the receipt.

Note: The card number on the reprinted receipt will be masked, i.e., only the last four digits will be printed in the clear. For example, **********1234.

8.3. Gift Card Transactions

8.3.1. Ernex Purchase With a Gift Card

Follow the procedure below to process the sale of goods or services using a Moneris gift card.

To process an Ernex Purchase with a gift card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Purchase**.
The "Total Amount" prompt appears.

3. Key in the total amount and press **OK**.
The "Swipe or Enter Card" prompt appears.

4a. Swipe the gift card.

OR

4b. Key in the gift card number and press **OK**.

If the "Password:" prompt appears, key in the manager password and press **OK**.

The "Enter CVC" prompt appears.

5. Key in the 3-digit validation code on the back of the card and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt.

6. If the terminal displays "Balance Due $###.##", follow the Ernex Transaction With a Balance Due instructions to complete the transaction.

The "Press OK key" prompt appears.

7. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.3.2. Deactivate an Ernex Gift Card

Follow the procedure below to deactivate a Moneris gift card.

IMPORTANT: Once the gift card is deactivated, it can never be used again.

To deactivate a Moneris gift card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Deactivate**.
The "Swipe or Enter Card" prompt appears.

3. Swipe the gift card.
The terminal displays the last four digits of the card number then the "Enter CVC" prompt appears.

4. Key in the 3-digit validation code on the back of the card and press **OK**.

   If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

   If prompted, key in the additional transaction information and press **OK**.

   If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt then displays "Press OK key".

5. Press **OK** to print the Merchant Copy of the receipt.
The "Transfer Balance to New Card?" prompt appears.

6a. To move the remaining balance to a new gift card:

   a. Select **Yes**.

   b. Proceed with step 3 in the Activation instructions using the new gift card.

IMPORTANT: A balance can be transferred only from and to variable amount gift cards.

6b. To deactivate the card and delete the balance:

   a. Select **No**.
   The gift card can no longer be used.

The terminal returns to the GIFT & LOYALTY transactions menu.

8.3.3. Ernex Refund With a Gift Card

Follow the procedure below to refund a gift card transaction. This credits a cardholder’s gift card for a previous gift card Purchase transaction.

To process an Ernex Refund with a gift card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Refund**.
The "Total Amount" prompt appears.

3. Key in the refund amount and press **OK**.
The "Swipe or Enter Card" prompt appears.

4. Swipe the gift card.
The "Enter CVC" prompt appears.

5. Key in the 3-digit validation code on the back of the card and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

The "Ernex Ref Number" prompt appears.

6a. Key in the original reference number from the Gift Card transaction receipt and press **OK**.

OR

6b. Press **OK** to leave this blank.

If the "Invoice Number" prompt appears, key in the Invoice number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt then displays the "Press OK key" prompt.

7. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.4. Loyalty Card Transactions

8.4.1. Purchase With an Ernex Loyalty Card (Point Accumulation)

Follow the procedure below to process an accumulation of loyalty points with a Purchase by credit card, debit card or cash; or with a credit Pre-Authorization, Pre-Authorization Completion or Advice.

IMPORTANT: When to awards points for a Pre Auth transaction:

Award points when you perform a Pre-Authorization if you know that you will NOT have the loyalty card available later when you perform the Pre-Authorization Completion.

Award points when you perform the Pre-Authorization Completion if you know that you WILL have the loyalty card available at that time.

To process a Purchase with an Ernex loyalty card:

1. Complete the Purchase, Pre-Authorization, Pre-Authorization Completion or Advice transaction that will accumulate points (see Transaction Procedures).

2. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

3. Select **Refund**.
The "Total Amount" prompt appears.

4. Key in the total amount and press **OK**.
The "Swipe or Enter Card" prompt appears.

Note: Consult your manager to determine the dollar amount to be entered (e.g., before taxes or including tip amount) to award points.

5. Swipe the loyalty card.
OR
Key in the card number and press **OK**.

If the "Clerk ID" prompt appears, key in the clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

If the "Benefit Amt" prompt appears, key in the benefit amount to be awarded and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt then the "Press OK key" prompt appears.

6. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.4.2. Deactivate an Ernex Loyalty Card

Follow the procedure below to deactivate a Moneris loyalty card.

IMPORTANT: Once the loyalty card is deactivated, it can never be used again.

To deactivate an Ernex loyalty card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Deactivate**.
The "Swipe or Enter Card" prompt appears.

3. Swipe the loyalty card.
OR
Key in the loyalty card number and press **OK**.

The terminal displays the last four digits of the card number.

If the "Clerk ID" prompt appears, key in the clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice number and press **OK**.

The terminal displays "Approved" and prints the customer copy of the receipt then displays "Press OK key".

4. Press **OK** to print the merchant copy of the receipt and returns to the GIFT & LOYALTY transactions menu.

8.4.3. Refund with an Ernex Loyalty Card

Follow this procedure to remove points from a cardholder's account when a Purchase that qualified for points is refunded (see Transaction Procedures).

To process a Refund with an Ernex loyalty card:

1. Complete the Refund transaction.

2. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

3. Select **Refund**.
The "Total Amount" prompt appears.

4. Key in the refund amount and press **OK**.
The "Swipe or Enter Card" prompt appears.

5. Swipe the loyalty card.
OR
Key in the card number and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

If the "Benefit Amt" prompt appears, key in the benefit amount from the original loyalty card transaction receipt and press **OK**.

The "Ernex Ref Number" prompt appears.

6. Key in the original reference number from the loyalty card transaction receipt and press **OK**.
OR
Press **OK** to leave this blank.

If the "Invoice Number" prompt appears, key in the invoice number and press **OK**.

The terminal displays "Approved" and prints the Customer Copy of the receipt, then the "Press OK key" prompt appears.

7. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.4.4. Ernex Redemption With a Loyalty Card

Follow the procedure below to process a payment for goods and services using a Moneris loyalty card.

To process an Ernex Redemption with a loyalty card:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Redemption**.
The "Swipe or Enter Card" prompt appears.

3. Swipe the loyalty card.
OR
Key in the card number and press **OK**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

If prompted, key in the additional transaction information and press **OK**.

The "Enter Amount" prompt appears.

4. Key in the total amount and press **OK**.

If the "Invoice Number" prompt appears, key in the Invoice Number and press **OK**.

The terminal displays "Approved" and prints the Customer copy of the receipt, then the "Press OK key" prompt appears.

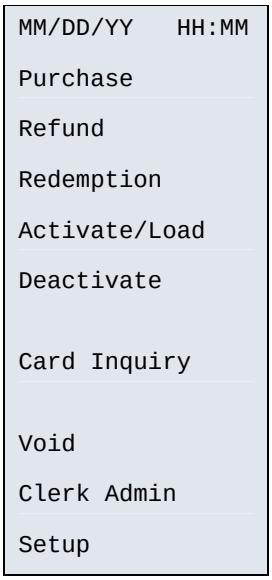
Note: If the terminal displays a "Balance Due" message, follow the steps in Ernex Transaction With a Balance Due.

5. Press **OK** to print the Merchant Copy of the receipt and return to the GIFT & LOYALTY transactions menu.

8.5. The Menu Feature in Ernex

8.5.1. The Ernex GIFT & LOYALTY Transactions Menu

The Ernex GIFT & LOYALTY transactions menu allows you to select the type of Ernex transaction you wish to process.



	Select this menu item to:
Purchase	perform a gift card Purchase OR a loyalty card Purchase
Refund	perform a gift card Refund OR a loyalty card Refund
Redemption	perform a loyalty card Redemption
Activate/Load	activate a gift card OR load additional value on a gift card
Deactivate	deactivate a gift card or loyalty card, OR transfer a balance from one gift card to another
Card Inquiry	display or print the balance and expiry date of a gift card or a loyalty card
Void	void any gift card or loyalty card transaction
Clerk Admin	add and delete Clerk IDs to your gift or loyalty program
Setup	configure GIFT & LOYALTY program parameters

Ernex GIFT & LOYALTY Transactions Menu

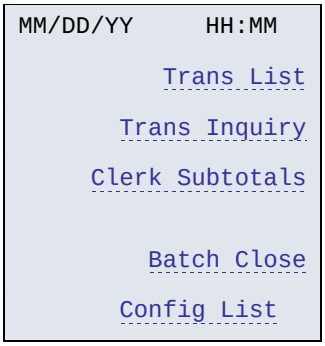
To access the GIFT & LOYALTY transactions menu:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

Note: For instructions on navigating through the menus and editing parameters, see The Menu Feature.

8.5.2. The Ernex Reports Menu

The Ernex Reports menu allows you to print a number of Ernex reports.



	Select this menu item to:
Trans List	print a list of all Ernex transactions in the terminal memory
Trans Inquiry	print the Transaction Inquiry Report
Clerk Subtotals	print a list of totals for one or more clerks (only active if Clerk Mode is configured)
Batch Close	close the Ernex batch
Config List	print a list of the current settings for each parameter

The Ernex Reports Menu

To access the Ernex Reports menu:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the **Reports** key (first purple key on the right).

Note: For instructions on navigating through the menus and editing parameters, see The Menu Feature.

8.5.3. The Ernex Setup Menu

The Ernex Setup menu allows you to set values for a number of Ernex parameters on your terminal. Some items may not appear on the terminal until a specific feature is enabled.

MM/DD/YY HH:MM	**Select this menu item to:**
Printer	configure the Ernex receipt format
Merchant	configure a variety of Ernex features
Comm	Do Not Use
IP Hosts	Do Not Use
Terminal	configure a variety of Ernex features
Initialization	initialize the terminal to the Ernex Host
About	displays Ernex application version information (press **OK** to exit)
Date/Time	Do Not Use
Demo	enter and exit Ernex Demo Mode

The Ernex Setup Menu

To access the Ernex Setup menu:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Select **Setup**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

Note: For instructions on navigating through the menus and editing parameters, see The Menu Feature.

8.6. Ernex Admin Transactions

8.6.1. Ernex Batch Close

This function closes a Moneris gift/loyalty card batch on the terminal and the Ernex Host, and prints a detailed transaction report.

To close an Ernex batch:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **Reports** key (first purple key on the right).
The Ernex Reports menu appears.

3. Select **Batch Close**.
If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The terminal communicates with the Ernex Host then the "Print Details Report?" prompt appears.

4a. To include details for each transaction in the printed Batch Summary Report, select **Yes**. This produces the same report as a Transaction Inquiry performed for all transactions in the current batch.

OR

4b.To print only totals in the report, select **No**.

The terminal prints the Batch Summary Report, communicates with the Ernex Host then returns to the Reports menu.

5. Press the **CANC ANNUL** key to return to the GIFT & LOYALTY transactions menu.

8.6.2. Initialization to the Ernex Host

This function sends information about the terminal to the Ernex Host and receives additional parameters and information from the Host. If you are setting up your terminal for the first time, follow the “First Initialization” instructions below.

If changes have been made to your Ernex configuration or your Ernex account, the terminal may display "Initialization Required" or the Merchant Service Centre may call and ask you to re-initialize your terminal. Follow the “Re-Initialization” instructions below.

First Initialization

This function MUST be performed once after completing configuration in order to use your terminal to process gift card or loyalty card transactions.

To perform the first Ernex initialization on your terminal:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Setup**.
The "Password:" prompt appears.

3. Key in the manager password and press **OK**.

4. On the Setup menu, select **Initialization**.
The "Ernex Term ID" prompt appears.

5. Key in the Ernex Terminal ID and press **OK**.
The terminal completes the initialization and returns to the Setup menu.

6. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

Re-Initialization

If changes have been made to your Ernex configuration or your Ernex account, the terminal may display 'Initialization Required' or the Merchant Service Centre may call and ask you to re-initialize your terminal.

To re-initialize your terminal:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Setup**.
The "Password:" prompt appears.

3. Key in the manager password and press **OK**.

4. Select **Initialization**.

5. If the "Batch Not Empty Close Batch?" prompt appears:

Select **Yes** to close the Ernex batch.
OR
Select **No** to leave the Ernex batch open.

The "Ernex Term ID" prompt appears.

6. Press **OK** to continue.
The terminal completes the initialization and returns to the Setup menu.

7. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.7. Ernex Reports

8.7.1. Ernex Transaction List

The Ernex Transaction List displays or prints Moneris gift/loyalty card transactions stored on the terminal in the current batch WITHOUT closing the batch.

To display a list of Ernex transactions:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the **Reports** key (first purple key on the right).
The Ernex Reports menu appears.

3. Select **Trans List**.
If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The "Print by Date or Batch?" prompt appears.

4a. To select transactions by date:

a. Select **Date**.
The "Date" prompt appears.

b. Key in the date and press **OK**.
OR
Press **OK** for all dates.

4b. To select transactions by batch number:

a. Select **Batch Number**.
The "Batch Num" prompt appears.

b. Key in the batch number (5 numeric digits) and press **OK**.
OR
Press **OK** for all batches

5. If the "Print Totals Only" prompt appears:

Select **Yes** to print just the terminal batch totals.

OR

Select **No** to print the transaction details as well as the terminal batch totals.

The terminal prints the list of Ernex transactions.

6. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.7.2. Ernex Transaction Inquiry

The Ernex Transaction Inquiry displays or prints details of Moneris gift and/or loyalty card transactions in the current batch WITHOUT closing the batch.

To print a Transaction Inquiry for Ernex transactions:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the **Reports** key (first purple key on the right).
The Ernex Reports menu appears.

3. Select **Trans Inquiry**.
If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The “All” prompt appears.

4a. To print all transactions for all cards:

a. Select **All**.
The "Card #:" prompt appears.

b. Press **OK** for all cards.

4b. To scroll through the list of cards and select a transaction:

a. Scroll through the list:
To scroll forwards, select **Next**.
To scroll backwards, select **Prev**.

b. When the correct transaction is displayed, press **OK** to select it.

4c. To retrieve information about a specific card number.

a. Select **Slct**.
The "Card #" prompt appears.

b. Key in the gift or loyalty card number and press **OK**.

4d. To return to the Reports menu, select **Exit**.

The "Enter Amount:" prompt appears.

5. Key in a dollar amount and press **OK**.
OR
Press **OK** for all amounts.

The "Date:" prompt appears.

6. Key in the date and press **OK**.
OR
Press **OK** for all dates.

The "Select option" prompt appears.

7a. To view information on the terminal, select **View** and scroll through the information.

To scroll forwards, select **Next**.
To scroll backwards, select **Prev**.

7b. To print the transaction information, select **Print**.

The terminal prints the report and returns to the **Reports** menu.

7c. To return to the Reports menu, select **Cncl**.

8. Press the **CANC ANNUL** key to return to the GIFT & LOYALTY transactions menu.

8.7.3. Clerk Sub-Totals Report for Ernex Transactions

This report displays or prints the totals of all Moneris gift/loyalty transaction types for one or more Clerk IDs in the current batch WITHOUT closing the batch.

IMPORTANT: Clerk IDs must be added to your merchant account on the Ernex Host before this report can be generated.

To print the Clerk Sub-Totals report for Ernex transactions:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the **Reports** key (first purple key on the right).
The Ernex Reports menu appears.

3. Select **Clerk Subtotals**.
If the "Clerk ID" prompt appears, key in the Clerk ID and press **OK**.

The "Zero Clerk totals" prompt appears.

4. To reset clerk totals to zero (0) upon completion of the report, select **Yes**.
OR
To continue accumulating clerk totals upon completion of the report, select **No**.

The "Select Clerks" prompt appears.

5a. To print subtotals for one clerk:

a. Select **One**.
b. Key in the Clerk ID and press **OK**.

5b. To print subtotals for a group of clerks:

a. Select **Grp**.
b. Key in the group ID and press **OK**.

5c. To print subtotals for more than one clerk:

a. Select **List**.
b. Key in the clerk ID and press **OK**.
The "Add more?" prompt appears.
c. Select **Yes** to add more clerks to the list.
OR
Select **No** to finish the list and print the report.

5d. To print subtotals for all clerks:

a. Select **All**.

6. The terminal prints the report and returns to the Reports menu.

7. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.7.4. Configuration List for Ernex

When you have finished configuring the gift/loyalty program on your terminal, print the Ernex Configuration List to have a printed record of the terminal's Ernex parameters.

To print the Ernex Configuration List:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Press the **Reports** key (first purple key on the right).
The Ernex Reports menu appears.

3. Select **Config List**.
The terminal prints the report and returns to the Reports menu.

4. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.8. Ernex Configuration

8.8.1. Ernex Printer and Receipt Parameters

Use the **Printer** selection on the Ernex Setup menu to configure Ernex printer and receipt parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Printer

Prmpt Beep Delay

Number of seconds to wait after beeping and displaying the "Tear Receipt; Press OK key" message before printing the customer receipt.

Key in number of seconds and press **OK** (120 = default).

Pre-print

Sets the terminal to begin printing the receipt header before the transaction is complete.

Off

On = Default

Enable Printer

Turns the printer on or off.

On = Default

Off (results in the "Printer Disabled" message any time a report should be printed or the "Printer Error" message any time a financial transaction is attempted)

Number of Copies

Sets the number of receipts printed for each transaction.

0 COPY - no receipts are printed

1 COPY - prints the customer copy

2 COPIES - prints the customer copy and the merchant copy = Default

2 COPIES OPTN - prints the customer copy and prompts for confirmation to print the merchant copy

3 COPIES - prints the customer copy, the merchant copy and a duplicate of the merchant copy

3 COPIES OPTN - prints the customer copy and the merchant copy and prompts for confirmation to print a duplicate of the merchant copy

8.8.2. Ernex Merchant Parameters

Use the **Merchant** selection on the Ernex Setup menu to configure Ernex Merchant parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Merchant

Merchant ID

Your Moneris Merchant ID.

Key in the numeric Merchant ID assigned to you by Moneris and press **OK**.

Moneris Term ID

Your Moneris Terminal ID.

Key in the numeric Terminal ID assigned to you by Moneris and press **OK**.

Ernex Term ID

Your Ernex Terminal ID.

Key in the 8-digit Terminal ID assigned to you by Ernex and press **OK**.

Rct Hdr 1 to 7

The seven lines of text that appear at the top of receipts.

Key in alphanumeric text (max. 40 characters) and press **OK**.

Footer 1 to 6

The six lines of text that appear at the bottom of receipts.

Key in alphanumeric text (max. 40 characters) and press **OK**.

Seq #

Not Editable

AutoClos Time

This parameter is updated to match the host each time the GIFT & LOYALTY application is initialized.

HHMMSS (**230000** = default)

Auto Close Tries

The number of times the terminal tries to perform a System Batch Close.

Key in a 2-digit numeric value (displayed in seconds, e.g., **60** = 60 seconds) and press **OK** (3 = default).

Auto Close Delay

The amount of time the terminal waits between attempts to perform a System Batch Close.

Key in a 2-digit numeric value and press **OK** (**10** = default).

Auto Close Opt

Determines whether the terminal will attempt a System Batch Close each day or whether the batch must be closed manually (Merchant Close).

No - you must perform a Batch Close manually (default).

Yes - the terminal will automatically attempt to close each day.

Beneft Amt Prmpt

Not Editable

Coupon Validation

Enables or disables coupon validation.

No (default)

Yes

Amt Verification

Enables or disables the verification prompt for the amount entered during an Ernex gift and/or loyalty transaction.

No (default)

Yes

8.8.3. Ernex Communications Parameters

Use the **Comm** selection on the Ernex Setup menu to configure Ernex communications parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Comm

Pri Auth Phone

Do Not Use

Sec Auth Phone

Do Not Use

Baud Rate

Do Not Use

Blind Dial

Do Not Use

Device Type

The Ernex device type.

Key in **7O** (capital letter “o”) and press **OK**.

Dial Type

Do Not Use

Backup Support

Do Not Use

Num Retries

Do Not Use

Reversal Retries

Do Not Use

8.8.4. Ernex Terminal Parameters

Use the **Terminal** selection on the Ernex Setup menu to configure Ernex terminal parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Terminal

Clrk/Srvr Mode

Enables or disables the "Clerk ID:" prompt. If Clerk Totals and Clerk ID input are supported, select **Prompt**.

None (default)

Prompt

Terminal Beep

Turns the key beep on or off.

Off

On (default)

PABX Code

Do Not Use

Demo Mode

Turns Ernex Demo Mode on or off.

Off (default)

On

Man Inv Prompt

Enables or disables the "Invoice Number" prompt during Ernex gift and/or loyalty transactions. Entry at the prompt is not required and can be bypassed by pressing **OK**.

Off (default)

On

Ernex Route Code

The Routing Identifier for the Ernex Host provided to you by Ernex or Moneris.

Key in **67** and press **OK**.

Language

Sets the terminal display language.

English (default)

French

8.8.5. Adding Clerk IDs to the Ernex Gift & Loyalty Application

Follow the procedure below to add Clerk IDs to be used when processing gift and loyalty transactions.

To add an Ernex Clerk ID:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Clerk Admin**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The CLERK ADMIN menu appears.

3. Select **Add Clerk** to add a clerk ID.
The "Clerk ID:" prompt appears.

4. Key in the Clerk ID to be added and press **OK**.
The "Clerk Added" message appears then the "Clerk ID:" prompt re-appears.

To continue adding Clerk IDs, repeat step 3 as needed. You can add a maximum of 20 Clerk IDs at one time.

Note: When 20 Clerk IDs have been entered for addition, the terminal communicates with the host to add the Clerk IDs to the Host.

5. When all the Clerk IDs have been entered for addition, press **CANC ANNUL**.
The "Send to Host?" prompt appears.

6. Select **Yes** to send the Clerk IDs to the host for addition.
The terminal communicates with the host then displays "APPROVED" and beeps.

7. Press **OK** to return to the CLERK ADMIN menu.

8. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.8.6. Deleting Clerk IDs From the Ernex Gift & Loyalty Application

Use this function to remove Clerk IDs so they can no longer be used when processing gift and loyalty transactions.

To delete and Ernex Clerk ID:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Clerk Admin**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The CLERK ADMIN menu appears.

3. Select **Delete Clerk** to delete a clerk ID.
The "Clerk ID:" prompt appears.

4. Key in the Clerk ID to be removed and press **OK**.
The "Clerk Deleted" message appears then "Clerk ID:" entry screen re-appears.

To continue deleting Clerk IDs, repeat step 3 as needed.

5. When all the desired Clerk IDs have been deleted, press **CANC ANNUL**.
The "Send to Host?" prompt appears.

6. Select **Yes** to send the Clerk IDs to the host for deletion.
The terminal communicates with the host then displays "APPROVED" and beeps.

7. Press **OK** to return to the CLERK ADMIN menu.

8. Press **CANC ANNUL** to return to the GIFT & LOYALTY transactions menu.

8.9. Ernex Demo Mode

Demo Mode allows you and your employees to practice performing gift and loyalty transactions on your Moneris terminal WITHOUT affecting your terminal total amounts, your financial accounts or your customers' accounts.

Note: Demo Mode is only available if you close your terminal batches on the terminal (Merchant Close). If your terminal uses System Close, you cannot use Demo Mode.

While the terminal is in Demo Mode:

- DEMO is printed at the top of each receipt and report.
- There is no transaction maximum, however, demo transactions for more than $10 produce a decline message.
- Transaction amounts equal to or greater than $1.00 produce a "Balance Due" message with an amount due of $1.00.
- All gift and loyalty transactions are supported.

8.9.1. Entering Ernex Demo Mode

Note: Demo Mode can only be activated on terminals that have been configured and initialized to the Ernex host.

IMPORTANT: You must close the current Ernex batch before you can enter Demo Mode. Do NOT clear the batch.

To enter Ernex Demo Mode:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Select **Setup**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The Setup menu appears.

3. Select **Demo**.
The "Demo Mode" prompt appears.

4. Select **On**.

The terminal displays "DEMO MODE ON" then the Setup menu re-appears with the DEMO icon displayed on the left side of the screen.

5. Press **CANC ANNUL** two times to return to the GIFT & LOYALTY transactions menu.

IMPORTANT: Ensure that you exit Demo Mode before processing actual gift or loyalty transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, Ernex accounts or customers' accounts.

8.9.2. Exiting Ernex Demo Mode

To exit Ernex Demo Mode:

1. On the applications menu, select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the Ernex transactions menu appears.

2. Select **Setup**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

The Setup menu appears.

3. Select **Demo**.
The "Demo Mode" prompt appears.

4. Select **Off**.
The "Batch Not Empty Clear Batch" message appears.

5. Select **Yes** to clear the demo batch so it does not affect totals of real Ernex transactions.

The terminal displays "DEMO MODE OFF" then the Setup menu re-appears. The DEMO icon is no longer displayed on the screen.

6. Press **CANC ANNUL** two times to return to the GIFT & LOYALTY transactions menu.

9. End-of-Day Procedure

The end-of-day procedure comprises a number of functions:

- Batch Close
- Batch Clear
- Batch Review
- Multi-Terminal Batch Close

9.1. Processing a Batch Close

Moneris has two types of settlement:

- Merchant Close - You are responsible for settlement/Batch Close at the end of each day.
- System Close - Moneris automatically settles your transactions at the end of the day.

To close multiple terminals at once, see Multi-Terminal Batch Close.

To print the Batch Totals report without closing the batch, see The Batch Totals Report.

9.1.1. Merchant Close

If your merchant account is set up for Merchant Close settlement, you must process a Batch Close transaction in order to have the funds from your POS transactions deposited to your business account. Here's how:

Step 1: Process a Batch Close Transaction

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Close Type?" prompt, select **Sngl**.
The terminal communicates with the Moneris Host then prints the Batch Totals section of the Batch Close Report.

4. At the "Prt Stored Trans?" prompt, select **Yes** to print the Stored Transactions Report.

5. At the "Rpt Period:" prompt:

   a. To print the transactions for a specific date, select **Date**, key in the date at the Date "YYYYMMDD:" prompt then press **OK**.

   OR

   b. To print all transactions in the batch, select **All**.

The terminal prints the Stored Transactions Report and the "Close Batch?" prompt appears.

Step 2: Confirmation

1. When the "Close Batch?" prompt appears, check that the totals on the Batch Totals Report match the totals on the printed Stored Transactions Report.

If they match, select **Yes** to close the batch. The terminal finishes printing the Batch Close Report and returns to the transactions menu.

If they do NOT match, select **No** to cancel the Batch Close process and call Moneris the next business day for reconciliation assistance.

Note: If you don't make a selection at the "Close Batch?" prompt within two minutes, the terminal will beep three times then return to the transactions menu without closing the batch

9.1.2. System Close

If your account is set up for System Close settlement, Morris automatically settles your transactions for you at the end of each day. You must verify transaction totals on a daily basis. Here's how:

Step 1: Print a Stored Transactions Report.

Step 2: Print a Merchant Sub-Totals Report.

IMPORTANT: The Merchant Sub-Totals Report must be printed before 11:00 p.m. local time.

Step 3: Confirmation

Confirm that the totals on the Merchant Sub-Totals Report match the totals on the Stored Transactions Report. If they do not match, contact Moneris within 30 days for reconciliation assistance.

9.2. Processing a Batch Clear

This function is primarily used by System Close merchants to clear the batch in the terminal memory. A system close is initiated by the Moneris Host and clears the batch on the host but not on the terminal. If the batch on the terminal is never cleared, any totals reports that rely on the terminal batch will continue to increment each day.

To process a Batch Clear:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Clear**.
If the "Password:" prompt appears, key in the Manager Password and press **OK**.

3. At the "Clear Batch?" prompt, select **Yes**.
The terminal clears the batch and returns to the transactions menu.

Note: If you select **No**, the terminal returns to the transactions menu without clearing the batch.

9.3. Processing a Batch Review

The Batch Review process retrieves transactions in the current batch by using the following retrieval methods:

- Clerk ID (**Clrk**)
- Transaction Amount (**Amt**)
- Last 4 Digits of the Card Number (**Acct**)
- Sequence Number (**Seq#**)

Once the transaction is retrieved, you can print a Transaction Inquiry, reprint the Merchant Copy of the receipt, or correct (void) the transaction.

Note: To use the Clerk ID retrieval method, you must enable Clerk ID Prompting. The method is not available if the Default Clerk ID option is enabled. This function does NOT include Pre-Authorization transactions. To review these transactions, you must print a Pre-Auth Transactions Report.

To process a Batch Review:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Review**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Retrieve By" prompt, select the method you want to use to retrieve transactions:

Clrk => key in the transaction Clerk ID and press **OK**.

Amt => key in the transaction amount press **OK**.

Acct => key in the last 4 digits of the transaction card number and press **OK**.

Seq# => key in the transaction Sequence Number and press **OK**. To review the first transaction in the batch, just press **OK**.

The terminal displays the following information for the first transaction that matches the criteria:

Seq#:
Card Name
Transaction Type
Card Number
Amount

4a. Select the action you want to perform:

Corr => perform a Correction (Void) on that transaction

Prev => move back to the previous transaction that matches the criteria

Next => move forward to the next transaction that matches the criteria

Prnt => print the details displayed on the screen in the Transaction Inquiry report format

OR

4b. Press the **REPRINT** key (2nd purple key from the right) to reprint the Merchant Copy of the displayed transaction's receipt.

5. Press **CANC ANNUL** twice to return to the applications menu.

9.4. Processing a Multi-Terminal Batch Close

This feature allows you to close batches by Terminal Name (i.e., on one or more terminals) or on all terminals from another terminal.

This function does NOT compare totals stored in the terminal memory to totals stored on the Moneris Host. Therefore, you should check that your receipts balance with the Batch Totals printed on the Multi-Terminal Batch Close Report. You can also check the balance by printing a Stored Transactions Report on each terminal included in the Batch Close.

IMPORTANT: A Multi-Terminal Batch Close can be performed only for terminals that are added to and associated with your Merchant Number on the Moneris Host (see Adding a Terminal Name).

9.4.1. By Terminal Name

You can process a Batch Close on one or more terminals by selecting the appropriate Terminal Name(s). You must therefore know the Terminal Name of the terminal whose batch you want to close.

To process a Batch Close on one or more terminals by Terminal Name:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Close Type?" prompt, select **Mult**.

4. At the "Terminal Name:" prompt, key in the name of the terminal and press **OK**.

The "Add Another Terminal?" prompt appears.

5a. To include more terminals in the Batch Close, select **Yes** then repeat steps 4 and 5 for each additional terminal to create the Batch Close process list. After you finish adding terminals, select **No**.

OR

5b. To include only the terminal selected in step 4, select **No**.

IMPORTANT: To close the batch for the terminal in use, you must add its Terminal Name to the Batch Close process list.

Note: You can include up to 20 terminals in a Batch Close. When you enter the 20th Terminal Name, the terminal automatically processes the Batch Close on them and returns to the "Add Another Terminal?" prompt. You can then add more terminals as above or select **No** to complete the Batch Close.

The terminal communicates with the Moneris Host then prints the Batch Totals section of the Multi-Terminal Batch Close Report.

6. At the "Batch Close?" prompt, select **Yes**.
The terminal communicates with the Moneris Host to close the batch, finishes printing the report with the Batch Close section and returns to the REPORTS menu.

7. Press **CANC ANNUL** to return to the transactions menu.

9.4.2. For All Terminals

You can process a Batch Close on all terminals associated with your Merchant Number on the Moneris Host.

To process a Batch Close on all terminals:

1. On the applications menu, select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the manager password and press **OK**.

3. At the "Close Type?" prompt, select **Mult**.

4. At the "Terminal Name:" prompt, press the (*) **ASTERISK** key and then press **OK**.

5. At the "Add Another Terminal?" prompt, select **No**.

6. At the "Batch Close?" prompt, select **Yes**.
The terminal communicates with the Moneris Host to close the batch, finishes printing the report with the Batch Close section and returns to the REPORTS menu.

7. Press **CANC ANNUL** to return to the transactions menu.

10. Troubleshooting

If your terminal is not working properly and an error message appears on the screen, go to the list of Error Messages and locate the message you see on the terminal. If the problem appears to be with the hardware, go to the list of Hardware Problems and locate the symptom. Then, review the possible problems and try the suggested solution.

Note: Please keep any receipts printed during problem transactions. The Merchant Service Centre representative may require information that appears on the receipts.

If this does not resolve the problem, contact the Moneris Merchant Service Centre for assistance.

10.1. Additional Documentation

Additional documentation for the Vx810 Duet can be accessed in a number of ways:

- On performing transactions and end-of-day procedures, please refer to the *Moneris Vx810 Duet Using Your Terminal* guide shipped with your hardware.
- On setting up your terminal, please refer to the *Moneris Vx810 Duet Setting up Your Terminal* guide also shipped with your hardware.
- For complete instructions, please refer to the *Moneris Vx810 Operating Manual*. To download a printable PDF of this manual, go to moneris.com/duet.
- To access the Moneris Vx810 Duet Webhelp, go to moneris.com/duet.
- For a copy of the Moneris *Merchant Operating Manual*, go to www.moneris.com/Support/Downloads/MerchantManuals.aspx.

To download other documentation, visit the Support - Downloads pages on our website www.moneris.com.

10.2. Telephone Assistance

When you need:

- to order POS stationary supplies including printer rolls
- to resolve balancing issues
- to solve problems with your terminal
- to report a Code 10 situation
- assistance changing your terminal configuration
- Credit Voice Authorizations

Please contact:

Moneris Merchant Service Centre

Toll free **1-866-319-7450**

24 hours a day, 7 days a week

10.3. Merchant Direct Secure Message Centre

Log in to Merchant Direct and use the Message Centre to send a secure message directly to the Moneris Merchant Service Centre.

10.4. Error Messages on the Moneris Vx810 Duet Terminal

A message will appear on the display if an error occurs. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact the Moneris Merchant Service Centre for assistance.

All error messages are listed in alphabetical order (regardless of their cause).

ERROR MESSAGE	PROBLEM & SOLUTION
CARD NOT SUPPORTED	The type of card swiped on the terminal does not match the card type selected at the READY screen. For example, a Debit card was swiped during a Credit Pre-Authorization transaction or an Ernex Gift Card was swiped for an Ernex Loyalty Card transaction. Try swiping the card again. If this message reappears, press **CANC ANNUL** to cancel the transaction and retry the transaction. OR Your merchant account with Moneris is not set up to accept the card type that was swiped. Request another form of payment then contact the Moneris Merchant Service Centre to discuss how to add that payment type to your merchant account.
CARD SWIPE ERROR	There is a problem with the magnetic stripe on the card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. If the message reappears: - for credit card with stripe – key in the card number. - for credit card with chip – swipe the card - for debit card with stripe or chip – request another form of payment.
CARD REMOVED - 991	The chip card was removed before the end of the transaction. Retry the transaction.
CHIP CARD MALFUNCTION	There was an error reading the chip card. Remove the card and retry the transaction. If the message reappears, swipe the card.
CHIP CARD SWIPED	A chip-enabled card was swiped. Insert the card in the chip card reader and resume the transaction.
CommServer Not Responding to VMAC	The Ethernet cable was connected to the base and the wall jack while you configured the static IP parameters. Power off then power on the terminal (leave the Ethernet cable connected to the base and the wall jack).
COMMSVR ENTRY PASSWORD ----------	The **2** key was pressed when the terminal was at the applications menu (e.g. attempting to key in a dollar value of $20.00 or another value that includes a 2). Press **CANC ANNUL** to return to the applications menu.

ERROR MESSAGE	PROBLEM & SOLUTION
	This symbol appears when the terminal is in Demo Mode. Exit Demo Mode to remove the symbol from the display.
EMPTY BATCH	If you attempt a Pre Auth Completion but there are no uncompleted Pre-Authorizations in the terminal memory, the Empty Batch message appears. Press OK to return to the Pre Auth menu.
ERR READ CARD NO.	There is a problem with the magnetic stripe on the card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. If the message reappears: - for credit card with stripe – key in the card number. - for credit card with chip – swipe the card - for debit card with stripe or chip – request another form of payment.
EXCEEDS REFUND LIMIT	The total value of refunds performed today is greater than your daily refund limit. Call the Moneris Merchant Service Centre for a temporary increase. Please have the original purchase receipt available for reference.
EXPIRED CARD	The expiry date on the card that was swiped has passed. Request another form of payment.
HOST LOGON REQUIRED	The terminal has been logged off to protect it from attempts to perform unauthorized transactions. Perform a Logon transaction.
INIT REQUIRED	When this message is displayed at the top of the screen (alternating with the date and time), the Moneris host is requesting a re-initialization of the terminal.
INVALID DATE	The date entered is not a valid date. The date must be entered in the MMYY format and must be a valid calendar date, e.g. 1409 is not a valid date. Check the date and re-enter it when the prompt re-appears.
INVALID	The password entered does not match the manager's password. Press **CANC ANNUL** then re-enter the manager password and press **OK**.
Inv# is 7 char max Press OK key	The Private Label card or Purchasing card used for this transaction only supports invoice numbers with a maximum of 7 characters. The invoice number keyed in earlier in the transaction was longer than 7 characters. Press **OK**. The "Invoice #:" entry screen appears. Check the invoice number, enter the correct number of characters and press **OK** to continue the transaction.

10. Troubleshooting

ERROR MESSAGE	PROBLEM & SOLUTION
INVALID ACCNT NO.	During a swiped credit card transaction, the digits entered as the last four of the credit card do not match the last four digits of the card number encoded on the card's magnetic stripe. Check the card number and re-enter the last four digits when the "Last 4 digits:" prompt re-appears. If the prompt reappears, contact the Moneris Merchant Service Centre for assistance.
LINE BUSY	Check if the phone line is shared with another piece of equipment, e.g. a fax machine. If it is, disconnect the other piece of equipment to leave the line free for the terminal and try the transaction again. OR Check if a prefix is required to dial out. If it is, set the PABX code to the required prefix then try the transaction again.
MUST SETTLE SOON	The terminal batch file is nearly full. Perform a Batch Clear transaction to empty the batch file.
NO ACTIVITY	There are no transactions associated with that clerk ID. OR That Clerk ID does not exist. Check the Clerk ID and try the Clerk Subtotals report again.
NO AIDs	If this message appears when the terminal is powering up, press **OK** to continue or wait 45 seconds for the terminal to continue on its own.
No Chip CD On Pre Auth Please Remove Card	Your terminal is not configured to process Pre Auth transactions using a chip card and a chip card has been inserted during a Pre Auth transaction. Remove the chip card, press **CANC ANNUL** to return to the transaction menu and perform a Purchase transaction with the chip card.
NO LINE	The terminal cannot detect a dial communications line. Check that all communications cables are connected to the base and the wall jack correctly. If they are, check the phone line for dial tone. Check that the phone line is an analog dial line. The terminal will not work on a digital phone line or on VoIP. Try the transaction again. If the message reappears, unplug and replug the power cable at the power source.
NO MATCH	The information you have used to find a transaction in memory can not be found. Check the information and try again.
NO NETWORK CONNECTION	Check the communications cable to ensure it is connected to the terminal and the wall jack.

ERROR MESSAGE	PROBLEM & SOLUTION
OUT OF RANGE	The Cashback amount requested exceeds the maximum Cashback value set on the terminal. Ask the cardholder to key in an amount lower than the maximum amount when the "Cash: " prompt re-appears. If this error message appears on a regular basis, consider increasing the cashback limit set on the terminal. OR If this message appears while the terminal is in Demo Mode, ensure the amount of the transaction plus Cashback is $1.00 or less, and the tip is $1.00 or less.
PAPER OUT	A problem has been detected with the printer. Open the printer and check that: - there is paper in the printer - the paper feed is clear. - the paper roll is seated correctly. Close the printer lid and ensure that it is closed completely. If the problem is fixed: The printer will finish printing the receipt or report that was in progress and complete the transaction. If the problem is not fixed: Press **OK**. The terminal will complete the transaction. Fix the problem then reprint the transaction. **Note:** Transactions should not be performed until the printer problem is fixed.
PHONE NUM FLDS EMPTY	The terminal has attempted to dial out but the phone number parameters are empty. If this message occurs during: - a financial transaction, call the Moneris Merchant Service Centre for assistance. - a Batch Close transaction, perform a Re-initialization then try the transaction again.
PRINTER ERR	Open the printer, check that there is a paper roll and that the roll is loaded properly then close the printer.
READ CARD ERR	There is a problem with the magnetic stripe on the card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. If the message reappears: - for credit card with stripe – key in the card number. - for credit card with chip – swipe the card - for debit card with stripe or chip – request another form of payment.
RECORD NOT FOUND	The information you have used to find a transaction in memory can not be found. Check the information and try again.
REFUND LIMIT EXCEEDED	The total value of refunds performed today is greater than your daily refund limit. Call the Moneris Merchant Service Centre for a temporary increase. Please have the original purchase receipt available for reference.

10. Troubleshooting

ERROR MESSAGE	PROBLEM & SOLUTION
RETRY TRAN?	Select **YES** to retry the transaction. The terminal will try to send the transaction to the Moneris Host using the card data already entered. Select **NO** to return to the transactions menu.
SETTLE FAILED	The connection with the Moneris host was lost during the batch close function and the settlement was not completed. Try the Batch Close again. If the batch totals are $0, print a Deposit Totals report and a Stored Transactions report then call the Moneris Merchant Service Centre.
SYSTEM PROBLEM	This message will be followed by one of the three following messages: - TCP INIT ERR: #### - TCP RECV ERR: #### - TCP SEND ERR: #### A communication error has occurred. Call the Moneris Merchant Service Centre and give the agent the four-digit number.
TABLE FULL	You have tried to add too many Clerk IDs or Terminal Names. You can add a maximum of 255 different Clerk IDs and 100 different Terminal Names.
TCP INIT ERR: ####	Refer to the SYSTEM PROBLEM error message.
TCP RECV ERR: ####	Refer to the SYSTEM PROBLEM error message.
TCP SEND ERR: ####	Refer to the SYSTEM PROBLEM error message.
TIP ERROR	The cardholder has keyed in a tip amount that is greater that the standard percentage or a tip percentage that is not defined in the terminal.
TRANS CANCELLED	The **CANC ANNUL** key was pressed during the transaction. - If the cardholder pressed the CANC ANNUL key, ask the cardholder to return the PINPad/terminal. - Press **OK** to display the merchant prompts and print the merchant copy of the cancelled receipt. - Retry the transaction.
TRANS NOT ALLOWED	You have attempted to perform a transaction that is either not configured on your terminal or not set up in your merchant account. If this appears during a Batch Close transaction, your merchant account is set up to close your batches automatically. Simply print a Merchant Sub-totals report at the end of each business day. Call the Moneris Merchant Service Centre for assistance.
USE MAG STRIPE ON TERMINAL	Your terminal is configured for Visa Debit Opt Out and you have attempted to perform a Visa Debit transaction. The message appears when you remove the card from the terminal after you receive a "Card Not Accepted" message and then press OK at the "Remove Card" prompt. Press **CANC ANNUL** and request another form of payment.
VIVO ENTRY PASSWORD	The "8" key was pressed when the terminal was at the applications menu (e.g. attempting to key in a dollar value of $8.00 or another value that includes an 8). Press **CANC ANNUL** to return to the applications menu.

10.5. Ernex Error Messages on the Vx810 Duet Terminal

A message will appear on the display if an error occurs in the GIFT & LOYALTY application. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact the Moneris Merchant Service Centre for assistance.

Additional error messages can be found in Error Messages on the Vx810Duet Terminal.

ERROR MESSAGE	PROBLEM & SOLUTION
811 SYSTEM ERROR PLEASE TRY LATER	The connection with the host was lost during the transaction processing and the transaction was not completed. Call the Moneris Merchant Service Centre.
Batch Balance – NO	If this message is printed on the batch summary report during an Ernex Batch Close, contact the Moneris Merchant Service Centre the next business day for reconciliation assistance.
CARD NOT IN BIN RANGE	The card type you swiped cannot be used for that transaction type. OR Your merchant account is not set up to accept the card type that was swiped. Request another form of payment.
CARD READ ERROR	There is a problem with the magnetic stripe on the card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. If the message reappears request another form of payment.
ERROR IN PRINTING	Open the printer, check that there is a paper roll and that the roll is loaded properly then close the printer.
NO MATCH FOUND	The information you have used to find a transaction in memory can not be found. Check the information and try again
NOT A LOYALTY CARD	The card swiped (or card number entered) during a Redemption transaction is not a loyalty card. Check the card and try again.

10.6. Solving Hardware Problems

If terminal does not display an error message but is not functioning correctly, review this list of hardware problems to find suggested solutions.

HARDWARE PROBLEM	SOLUTION
Communication problems are happening intermittently.	Contact the Moneris Merchant Service Centre for assistance.
Chip cards cannot be processed.	If the card entry prompt is "Swipe Card" and the terminal won't accept inserted chip cards (i.e. it beeps and remains at "Swipe Card" when a chip card is inserted), contact the Moneris Merchant Service Centre for assistance.
Display screen is blank	Ensure that the power cable is firmly connected to the power port on the Duet base and the wall jack. If the display is still blank, contact the Moneris Merchant Service Centre for assistance.

10. Troubleshooting

HARDWARE PROBLEM	SOLUTION
Display lighting is too bright or too dark	The contrast setting is too high or too low. Check the contrast setting and increase or decrease it to work with the lighting at the terminal location.
Magnetic Stripe Card reader won't read cards.	Try swiping the card more quickly or more slowly or from the front of the reader towards the back. Try swiping a different card. If this card can be read, the problem is with the first card. Request another form of payment. Use a Head Cleaning Card to clean the card reader (a.k.a. the magnetic stripe reader or MSR). Contact the Moneris Merchant Service Centre if you need Head Cleaning Cards. If the card reader still won't read cards, contact the Moneris Merchant Service Centre for assistance.
Leftmost LED on the contactless reader is not lit up.	Check that the contactless reader module is securely connected to the terminal or to the top of the Vx810 PINPad.
Nothing is possible on the terminal after initial communications configuration is completed: not initialization, not transactions	Contact the Moneris Merchant Service Centre for assistance.
Printer Jam	Open the printer and check that: - the paper feed is clear. - the paper roll is seated correctly. Close the printer lid and ensure that it is closed completely. When the problem is fixed, the printer will finish printing the receipt or report that was in progress. If necessary, reprint the transaction. **Note:** Debit transactions cannot be performed until the printer problem is fixed. Credit transactions can be performed manually if necessary.